



# Development Monitoring System Report

## Howard County, Maryland

Prepared by  
Howard County Department of Planning and Zoning

January 2001



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## DEPARTMENT OF PLANNING & ZONING

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*Joseph W. Rutter, Jr., Director*

January 4, 2001

A Message from the Planning Director:

I am pleased to present the annual Development Monitoring System Report. This year's report is more extensive than previous reports, primarily in the form of additional maps and charts. The maps and charts more clearly indicate where and to what extent development activity has and continues to occur in the County. Highlights to the report are noted on Page 14 of the Executive Summary.

Over the last five years there has been an annual average of about 2,000 new housing units and 3.2 million square feet of non-residential space built in the County. An average of about 6,300 new jobs have been created annually over the last five years. Furthermore, job growth is likely to remain strong over the next few years as indicated by approved site development plans. Last year, 3.3 million square feet of non-residential space were approved with an estimated capacity of 8,450 new jobs.

The data presented in this report reflect the impact that the strong national and regional economies have had on development in Howard County. The data also reflect the impact that the Adequate Public Facilities Ordinance has had on residential development, slowing growth in areas that have had excessive demand for new units. This annual report will continue to provide valuable information on development activity in the County, and in particular help monitor the impact of the recently adopted General Plan 2000.

Sincerely,

Joseph W. Rutter  
Director

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# Development Monitoring System Report

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**Produced by:**

Howard County Department of Planning and Zoning  
Division of Research

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# Executive Summary

## Adequate Public Facilities Act

In response to the *1990 General Plan*, the Adequate Public Facilities Act of 1992, expressed "the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist."

Section 16.1108 of the Adequate Public Facilities Act directs that "The Department of Planning and Zoning will monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- (1) Subdivision plans and site development plans approved during the last several years, including number of residences or the number of new employees projected for the approved subdivisions and land developments.
- (2) Subdivision plans and site development plans in-process at the time of the report, including the number of housing unit allocations or the number of new employees projected for the proposed subdivisions and land development.
- (3) Building permits and certificates of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued."

## Methodology

This is the ninth annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits.

Both approved and currently in-process land development plans are tabulated. Annual data for development activity are reported for the period October 1 through September 30 for the past five years beginning in October 1, 1995. More detailed information is reported for the most current year, October 1, 1999 to September 30, 2000. The report is divided into Residential and Non-Residential sections.

Residential development is tabulated by six school regions (Map 1). Each year, the Board of Education issues the school region map. The regions have remained the same since 1995, but earlier maps have differed. Past tabulations are based on the map in effect at the time of tabulation. The County Council recently adopted legislation that changes the number of housing unit allocation regions from six to five. This creates fixed non-changeable regions for purposes of housing unit allocations. A new allocation chart based on these five regions will soon be under consideration by the County Council. (Refer to the section on Housing Unit Allocations, Page 46, for further details.)

Non-residential development is tabulated by four employment regions (Map 3, Page 10). These regions have remained the same for all reporting periods since the beginning of APFO.

## Residential Development

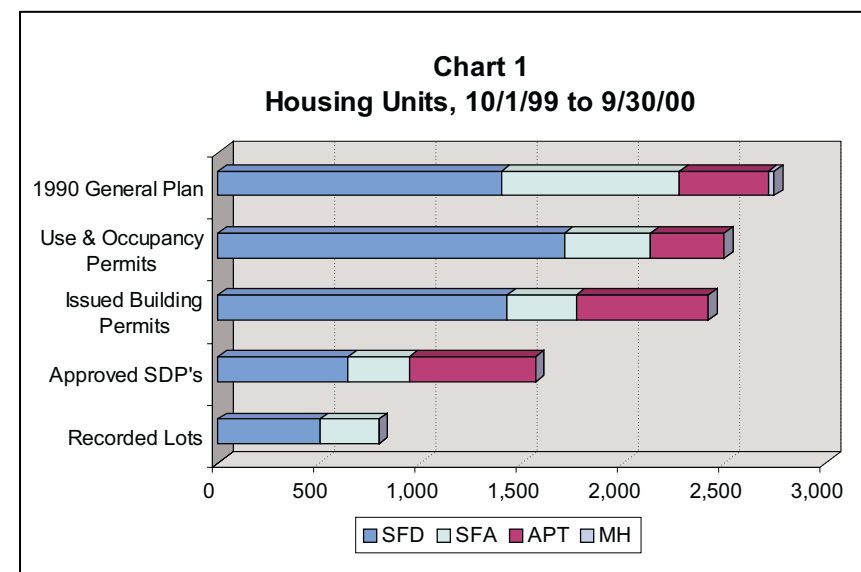
### Development Compared to the 1990 General Plan

The 1990 General Plan established residential growth targets of 50,000

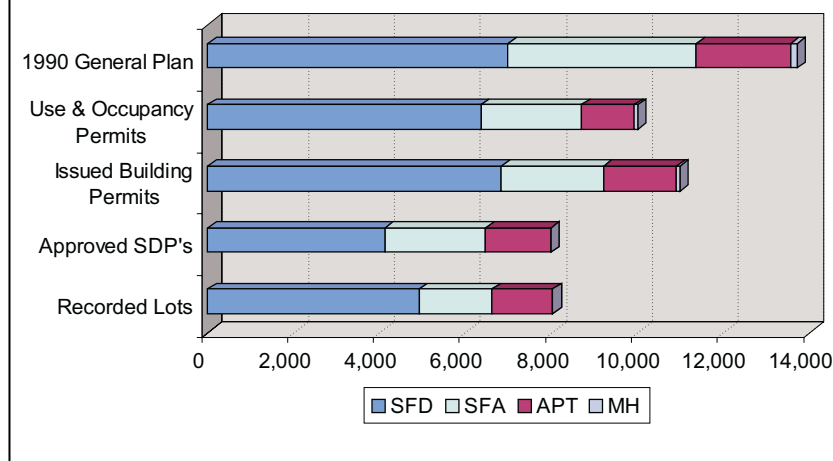
new units between 1990 and 2010. Growth rates were expected to vary year to year with an average of 2,500 units annually. Specifically, between 1995 and 2000 the expected average growth rate was 2,740 new units per year. Of these units, slightly more than half were to be single family detached (SFD), almost one-third were to be single family attached (SFA) and about 16 percent were to be apartments (APT).

Chart 1 compares the annual General Plan projections to development activity from October 1, 1999 to September 30, 2000. Last year, residential development – which can be measured by the numbers of lots recorded, units in site development plans (SDP), building permits issued and use & occupancy permits issued – was less than the General Plan target. A total of 2,418 building permits and 2,494 use & occupancy permits were issued. There were 1,565 units in approved SDP's and only 792 units from recorded lots.

This is also reflected in the five year period from October 1, 1995 to September 30, 2000. As indicated in Chart 2, the five year growth expectation of the General Plan exceeds actual development activity. A total of 10,977 building permits and 9,993 use and occupancy permits were issued, both



**Chart 2**  
**Housing Units, 10/1/95 to 9/30/00**



less than the 13,700 units predicted by the 1990 General Plan. Over the five years, there were a total of 7,980 units in approved SDP's and 8,021 units from recorded lots.

It is important to note that residential development in the County typically begins with the subdivision process where new lots are recorded, followed by the site development plan (SDP) process, and then the issuance of building and use & occupancy permits. However, not all recorded lots must go through SDP phase and not all units reflected in SDP's are units that went through the subdivision process.

Residential SDP's are required for all residential lots 20,000 square feet or less, slightly less than a half an acre. Many lots, especially in the West, are larger than 20,000 square feet. Consequently, SDP's do not account for all residential growth in the County. Also, not all units in SDP's, such as apartment buildings on bulk parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1995. Since all new housing units require building permits and ultimately use and occupancy permits, these measures more fully re-

flect actual development activity in the County. This also explains why the numbers of recorded lots and units in SDP's are less than the numbers of building and use & occupancy permits.

## Development Location and Unit Type

Map 1 shows the five year results for each development stage by school region. It is clear that most of the activity has been concentrated in the North, Northeast and West school regions. There has been comparably less activity in Columbia West, Columbia East and the Southeast regions.

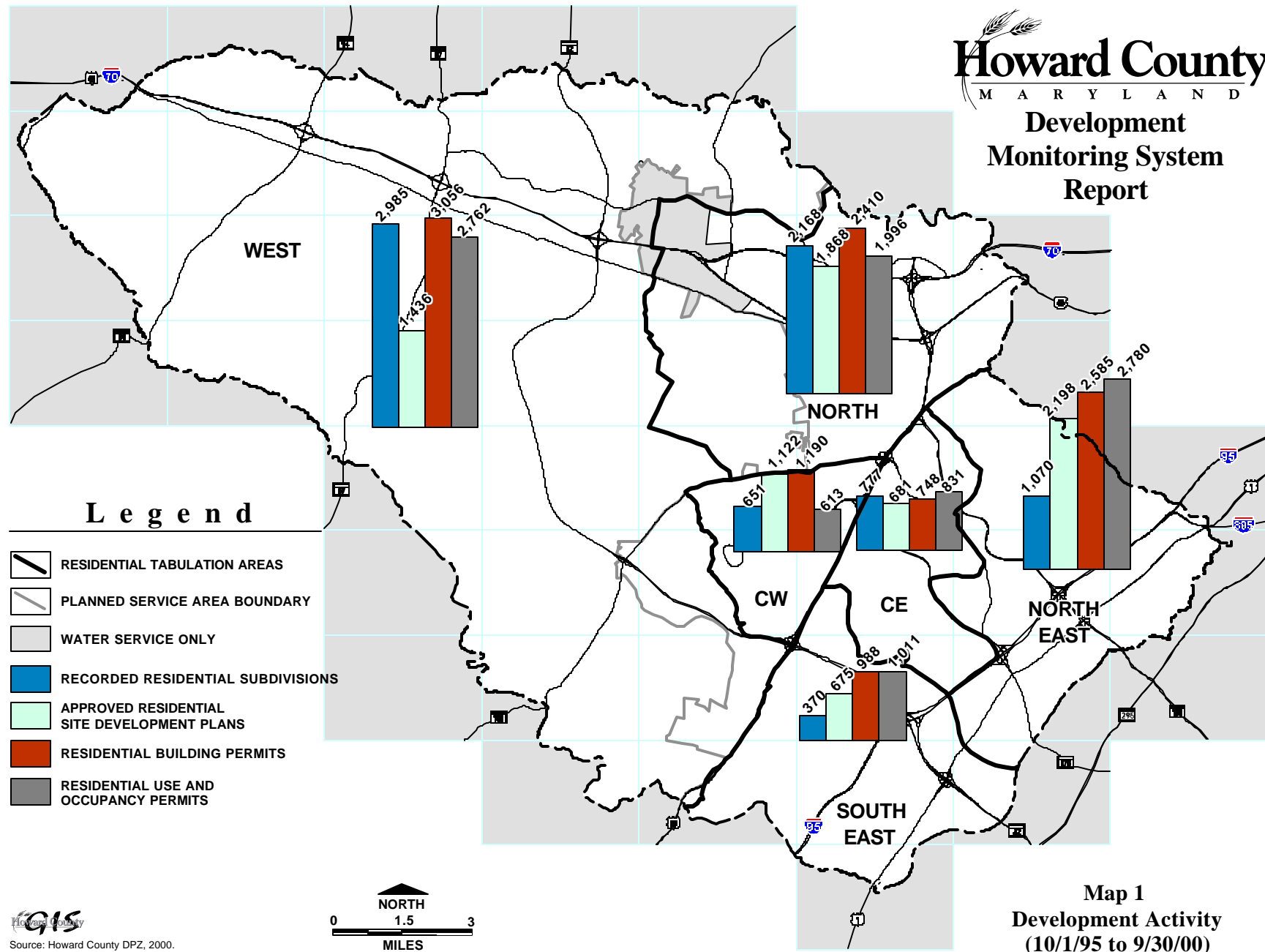
Map 2 shows the five year building permits issued by unit type for each region. In addition to showing the unit type breakdown in each region, the size of the pie charts also reflect the relative number of issued permits. The overall Countywide breakdown of issued building permits is 62 percent single family detached, 22 percent single family attached, 15 percent apartment units and 1 percent mobile homes. This compares to the 1990 General Plan projection to the year 2010 of 51 percent single family detached, 32 percent single family attached, 16 percent apartments and 1 percent mobile homes.

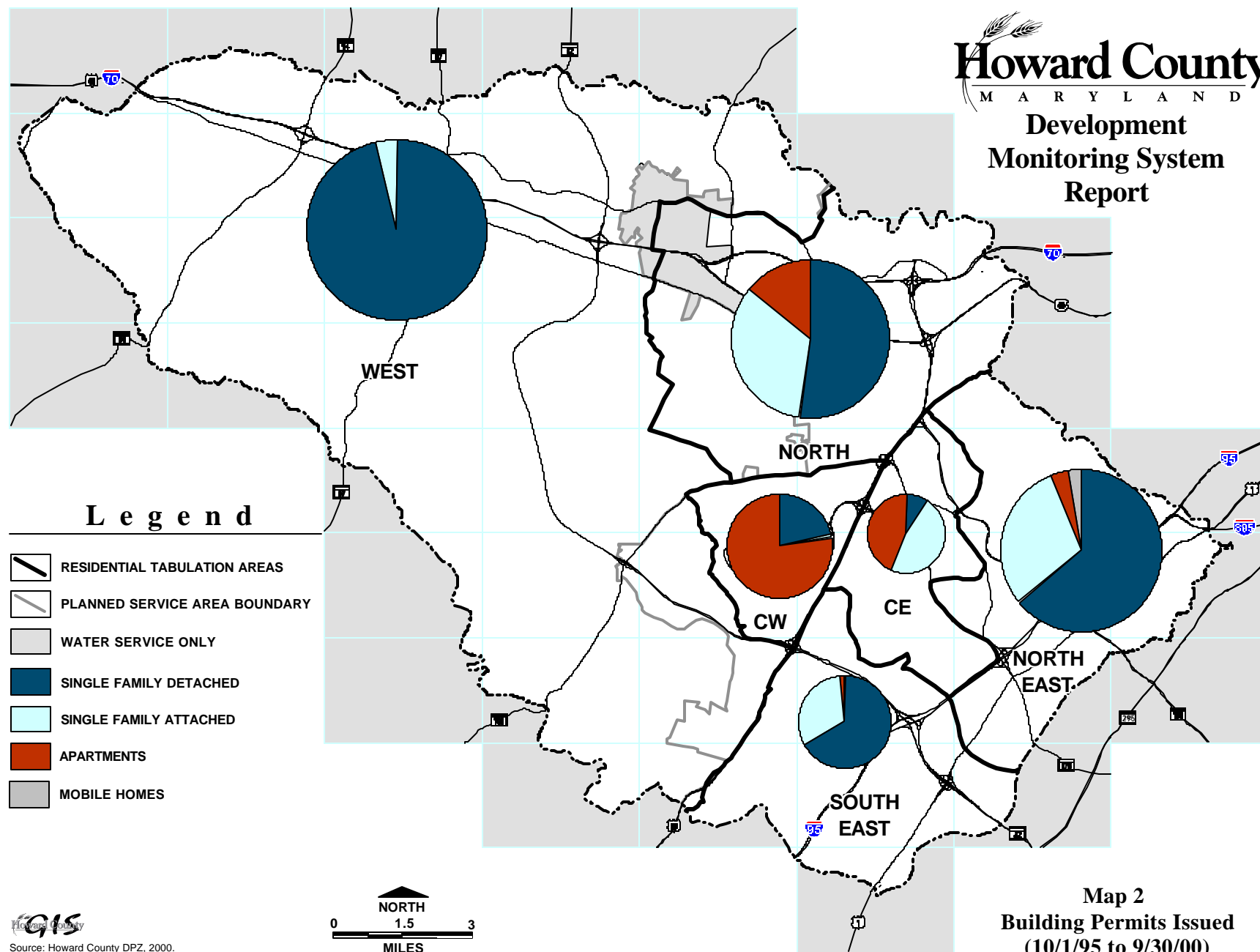
The map clearly shows how this varies by region with higher concentrations of permits for apartments and single family attached units in Columbia West and Columbia East and a higher concentration of permits for single family detached homes in all the other regions, particularly in the West.

Chart 3 shows the Countywide percentage breakdown by unit type by development stage. The unit percentages for subdivisions and SDP's in process as of September 30, 2000 are also shown for comparison purposes. Subdivisions in process reflect plans under review with lots not yet recorded, and SDP's in process reflect units in site development plans yet to be approved. In general, there is a greater percentage of higher density single family attached and apartment units in process compared to what has been developed over the last five years.

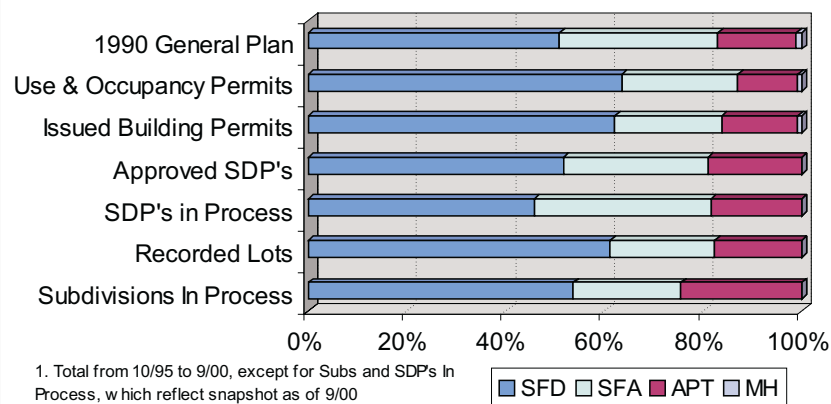
Further details regarding these and other development activities are discussed in the sections below.







**Chart 3**  
**Housing Unit Type by Development Stage<sup>1</sup>**



## Subdivisions

### Recorded Subdivisions

Over the last five years in the County, lots for 8,021 housing units in 775 subdivision plans were recorded. This equates to a five year average of 1,604 lots per year. Last year, there were only 792 lots recorded, the lowest of all five years, and about half the five year average.

Of the total lots recorded over the five year period, 61 percent were for single family detached units, 21 percent were for single family attached or townhouse units and 18 percent were for apartment units. Last year, the breakdown was 64 percent and 36 percent for single family detached and attached units, respectively. This can be compared to the current County breakdown of 54 percent, 21 percent, and 23 percent for single family detached, single family attached and apartment units, respectively.

For the five year period, 37 percent of the 8,021 total lots were recorded in the West, 27 percent in the North, 13 percent in the Northeast, 10 percent in

Columbia East, 8 percent in Columbia West and 5 percent were in the Southeast. Last year, the North had the most recordings with 43 percent of the total 792 recorded lots. This is followed by the West (30 percent), Columbia West (16 percent), the Northeast (7 percent), Southeast (3 percent) and Columbia East (1 percent).

### Subdivisions in Process

Prior to the recordation of lots, subdivision plans must receive approval through the Department of the Planning and Zoning's subdivision review process. A total of 5,340 lots were in process as of September 30, 2000, about 9 percent more than the 4,887 lots in process one year earlier. These lots were in a greater number of plans, 151 plans compared to 131 plans for the previous year.

About 54 percent of the potential lots in process as of September 30, 2000 were for single family detached homes. About 22 percent were for single family attached units and 24 percent were for apartment units. This percentage breakdown is similar to the existing unit breakdown in the County.

The North had the largest number of units in process with 1,990, or 37 percent of the Countywide total. Fifty of these units are on hold in the waiting bin because allocations are no longer available in the North for the current allocation year. This is followed by the Southeast (32 percent), the Northeast (20 percent), the West (8 percent), Columbia East (2 percent) and Columbia West (1 percent). It is important to note that a large percentage of these units, about 58 percent, are part of phased projects with building planned for future years as far out as 2010.

Large projects in process include Turf Valley and Waverly in the North, the Key property in the Southeast, and the Oaks at Waters Edge and Autumn View in the Northeast.

## Site Development Plans

### Approved Plans

Over the last five years in the County, 7,980 housing units in 356 site development plans were approved. This equates to a five year average of

1,596 units per year. Last year, there were 1,565 approved units, close to the five year average.

Of the total units approved over the five year period, 52 percent were for single family detached units, 29 percent were for single family attached or townhouse units and 19 percent were for apartment units. Last year, the breakdown was 41 percent, 19 percent, and 40 percent for single family detached, single family attached and apartment units, respectively.

For the five year period, 28 percent of the units were in the Northeast, 23 percent in the North, 18 percent in the West, 14 percent in Columbia West, 9 percent in Columbia East and 8 percent in the Southeast. Last year, Columbia West had the most approved units with about 40 percent of the total 1,565 units. Most of these were for apartment units in Town Center. This is followed by the Northeast with 25 percent, North with 20 percent and the West with 13 percent of the total approved units. The Southeast and the Columbia East each had about 1 percent of the total, with only 17 and 12 units respectively.

### ***Plans in Process***

A total of 1,028 units were in the site development plan process as of September 30, 2000, about 34 percent less than the 1,564 units in process one year earlier. These units were in about the same number of plans, however, 27 plans compared to 25 plans for the previous year.

The greatest number of units in process as of September 30, 2000 were for single family detached homes with 471, 46 percent of the 1,028 unit total. This is followed by 386 single family attached units and 189 apartment units, 36 percent and 18 percent of the total, respectively.

The North had the largest number of units in process in 2000 with 304, about 30 percent of the Countywide total. Of these units, 189 are on hold in the waiting bin because allocations are no longer available in the North for the current allocation year. This is followed by the Northeast and West with 286 (27 percent) and 255 (25 percent) units in process, respectively. The Columbia East and Columbia West had the remaining 183 units in process (18 percent). There were no units in process in the Southeast as of

September 30, 2000.

Large plans in process include a project for SFA elderly housing units (Howard County Medical Research Park) and two plans for SFD units (Hollifield Estates) in the North region. New Colony Village in the Northeast, River Hill in the West, and a SFA unit development in Columbia West (Town Center) are also significant projects.

## **Building Permits and Use & Occupancy Permits**

### ***Building Permits***

Since October 1, 1995, 10,977 building permits for residential units have been issued. This equates to a five year average of 2,195 permits per year. Last year, there were 2,418 issued permits, about 10 percent more than the five year average.

Of the total permits issued over the five year period, about 62 percent were for single family detached units, 22 percent were for single family attached units, 15 percent were for apartment units and 1 percent were for mobile homes. Last year, the breakdown was 59 percent, 14 percent, and 27 percent for single family detached, single family attached and apartment units, respectively.

For the five year period, about 28 percent of the units were in the West, 24 percent in the Northeast and 22 percent in the North. The remaining 26 percent were in Columbia West, Columbia East and the Southeast. This compares to last year's breakdown of 27 percent in the West and 25 percent each in Columbia West and the North. The remaining 23 percent of the issued permits were in the Northeast, Columbia East and the Southeast last year.

### ***Use and Occupancy Permits***

Since October 1, 1995, 9,993 use and occupancy permits for residential units have been issued, an average of about 2,000 permits per year. Last year, there were 2,494 issued use and occupancy permits, about 25 percent more than the five year average.

Of all the permits issued since October 1, 1995, 64 percent were for single family detached units, 23 percent were for single family attached units, 12 percent were for apartment units and 1 percent were for mobile homes. Last year, the breakdown was 69 percent, 17 percent, and 14 percent for single family detached, single family attached and apartment units, respectively.

For the five year period, 28 percent of the issued permits were in the West, another 28 percent were in the Northeast, and 20 percent were in the North. The remaining 24 percent were in Columbia West, Columbia East and the Southeast. This compares to last year's breakdown of about 29 percent each in the North and West and 20 percent in the Northeast. Columbia East, Columbia West and the Southeast make up the remaining 22 percent of the total issued use and occupancy permits last year.

## Land Preservation

Last year, from October 1, 1999 to September 30, 2000, almost 223 acres of land were preserved and enrolled in Howard County's Agricultural Land Preservation Program. An additional 625 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels resulting in a total of 848 permanently preserved acres. All of this preserved acreage was a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations.

Since 1992, 7,198 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 71 percent of this total, 5,125 acres, has gone into preservation and permanent open space. The remaining 29 percent, 2,073 acres, has been or is planned for development on 1,585 lots with 179 acres of roadway.

To date, there are about 18,085 acres of permanently preserved agricultural land in the Rural West and about 3,780 acres preserved as easements in other dedication and open space programs, for a total of 21,865 acres. Please refer to the Land Preservation section, Page 56, for further details.

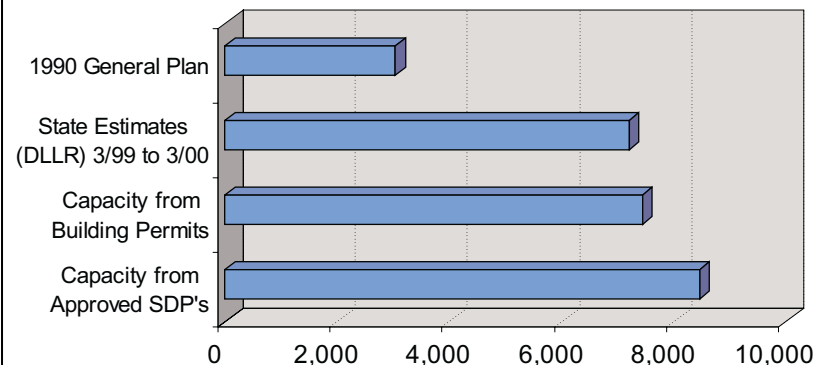
# Non-Residential Development

## Job Growth Compared to the 1990 General Plan

The 1990 General Plan targeted job growth in Howard County to increase by an average of 2,820 jobs annually between 1990 and 1995 and 3,040 jobs annually between 1995 and 2000. Based on this, the growth expected between 1995 and 2000 would be 15,200 jobs. Charts 4 and 5 show these General Plan targets compared to actual job growth based on estimates from the State Department of Labor, Licensing and Regulation (DLLR) and potential employment from approved site development plans and issued building permits.

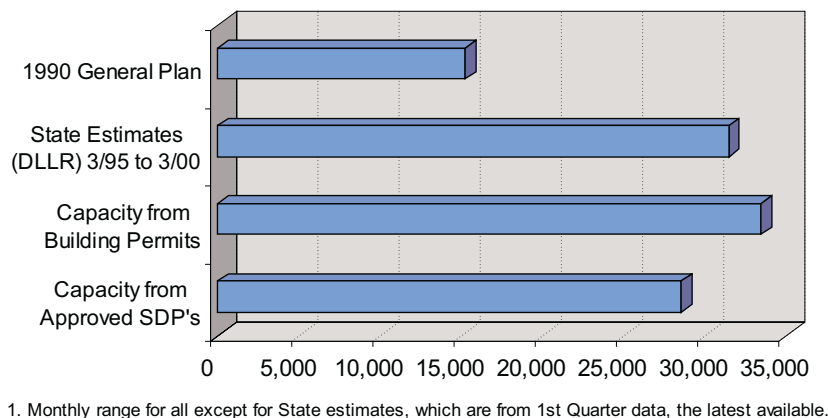
Potential employment growth from approved site development plans and building permits has been estimated based on information provided by the employer or as indicated on the plan. Where this information was not available a generalized ratio of employees to square footage was used. This ratio varies depending upon the category of non-residential use (retail, office/service, manufacturing/extensive industrial and government/ institutional).

**Chart 4**  
**1-Year Job Growth, 10/1/99 to 9/30/00<sup>1</sup>**



1. Monthly range for all except for State estimates, which are from 1st Quarter data, the latest available.

**Chart 5**  
**5-Year Job Growth, 10/1/95 to 9/30/00<sup>1</sup>**



It is clear from the charts that over the most recent one-year reporting period and over the last five years, job growth in Howard County has far exceeded the 1990 General Plan targets.

The one-year job growth estimates from the State from first quarter 1999 to first quarter 2000 indicate that there were 7,193 new jobs, more than double the 3,040 1990 General Plan annual target. Job growth as reported by the State over the five year period totals 31,408, also more than double the 1990 General Plan five year target of 15,200 new jobs.

Similar to the State estimates of actual job growth, both the one year and five year job growth estimates based on building capacity reflected in site development plans and issued building permits also exceed the 1990 General Plan targets. Please refer to the section on Employment Estimates for further details (Page 84).

## Development Type and Location

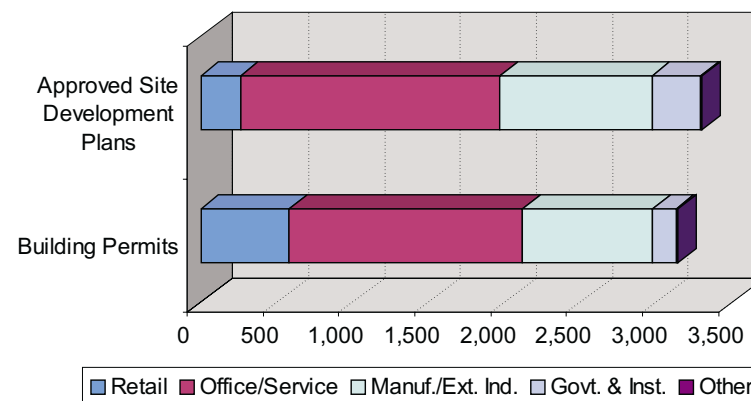
Last year, from October 1, 1999 to September 30, 2000, about 3.3 million

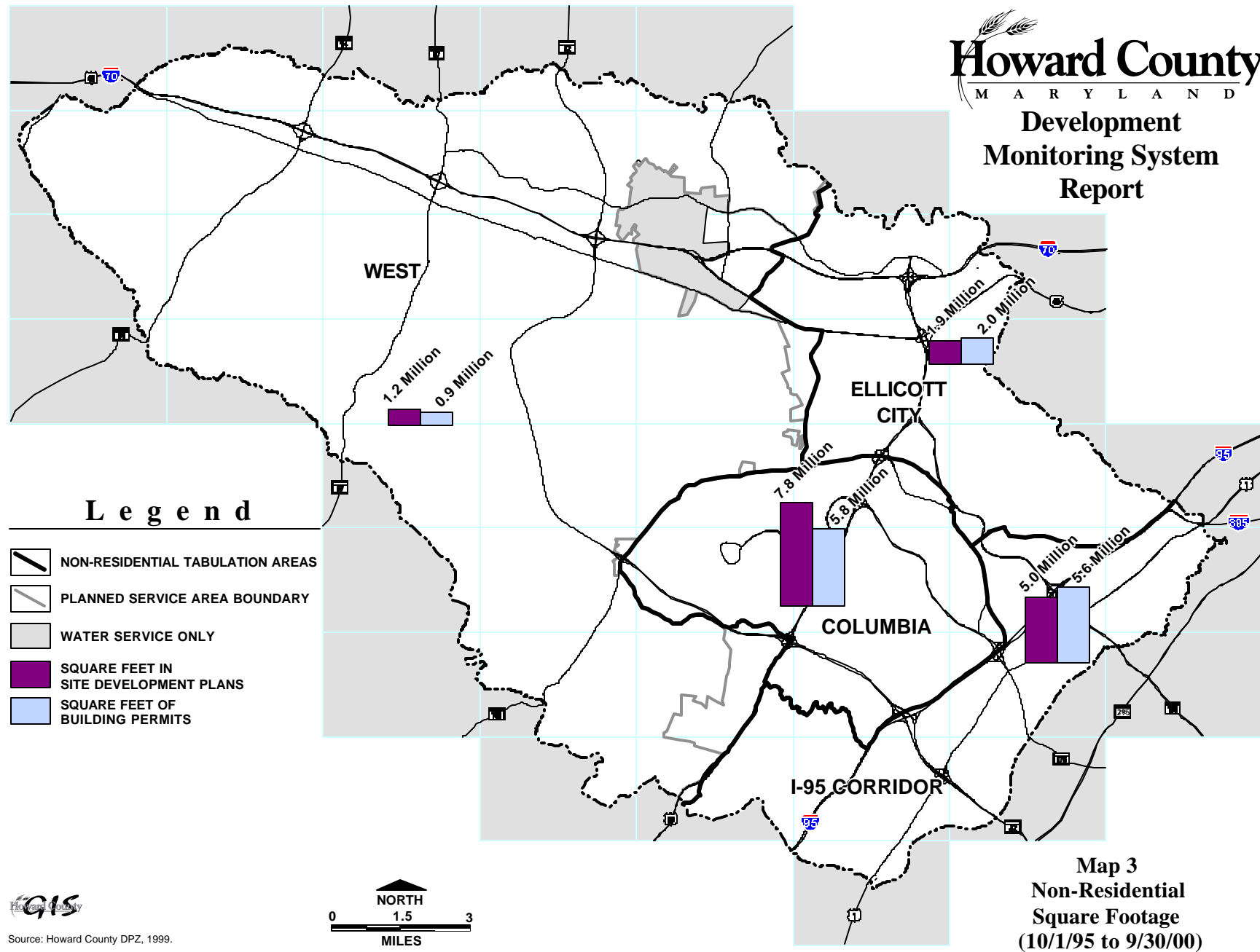
square feet of building space were approved in site development plans. Building permits were issued for about the same amount of square footage. Most of the space was for office/service space, followed by manufacturing/extensive industrial space. Retail and governmental & institutional development were comparably less (Chart 6).

Chart 7 shows the results for the five year period from October 1, 1995 to September 30, 1999. During this time period about 15.9 million square feet were approved in site development plans and 14.4 million square feet in issued building permits. These represent an average of about 3 million square feet per year. Most of the new building space was for manufacturing/extensive industrial and office/service uses. Similar to the one year results, retail and government & institutional development were comparably less.

Map 3 shows the five year total square footage by location for both building permits and approved site development plans. The map clearly indicates that most of the non-residential development activity has been located in Columbia and the I-95 Corridor. Smaller amounts of non-residential development have occurred in Ellicott City and the West.

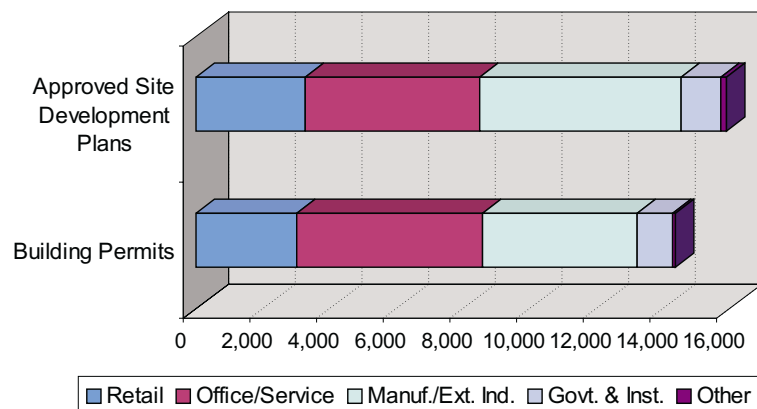
**Chart 6**  
**Non-Residential Square Feet (X 1,000)**  
**10/1/99 to 9/30/00**







**Chart 7**  
**Non-Residential Square Feet (X 1,000)**  
**10/1/95 to 9/30/00**



Map 4 shows the total square footage in issued building permits over the last five years by type of development for each region. In addition to showing the building type breakdown in each region, the size of the pie charts also reflect the relative square footage in the issued permits. The overall Countywide square footage breakdown is about 39 percent office/service space, 32 percent manufacturing/extensive industrial, 21 percent retail space and 7 percent government & institutional space. Less than 0.5 percent is for other uses.

The map clearly shows how this varies by region with higher concentrations of office/service space in Columbia and a higher concentration of manufacturing/extensive industrial uses in the I-95 Corridor. The Columbia region includes Gateway, where most of the new office development has been located.

Further details regarding non-residential development activities are discussed in the sections below.

## Subdivisions

### *Recorded Subdivisions*

Over the last five years in the County, 518 non-residential lots in 210 subdivision plans totaling 5,070 acres were recorded. This equates to a five year average of about 1,000 acres per year. Last year, there were 1,190 acres recorded.

For the five year period, about 60 percent of the 5,070 acres were recorded in Columbia, 20 percent in the I-95 Corridor, 11 percent in Ellicott City and about 9 percent in the West. Last year, 55 percent of the total 1,190 acres were recorded in Columbia. This is followed by the I-95 Corridor with 27 percent, the West with 12 percent and Ellicott City with 6 percent.

### *Subdivisions In Process*

Prior to the recordation of lots, subdivision plans must receive approval through the subdivision review process. A total of 64 lots in 29 subdivision plans totaling 755 acres were in process as of September 30, 2000. This acreage is about 18 percent less than the 918 acres in process one year earlier.

Of the total 755 acres in process, 440 acres (58 percent) are in the I-95 Corridor. About 227 acres (30 percent) are in Columbia and 87 acres (12 percent) in the West. There is 1 acre in process in Ellicott City.

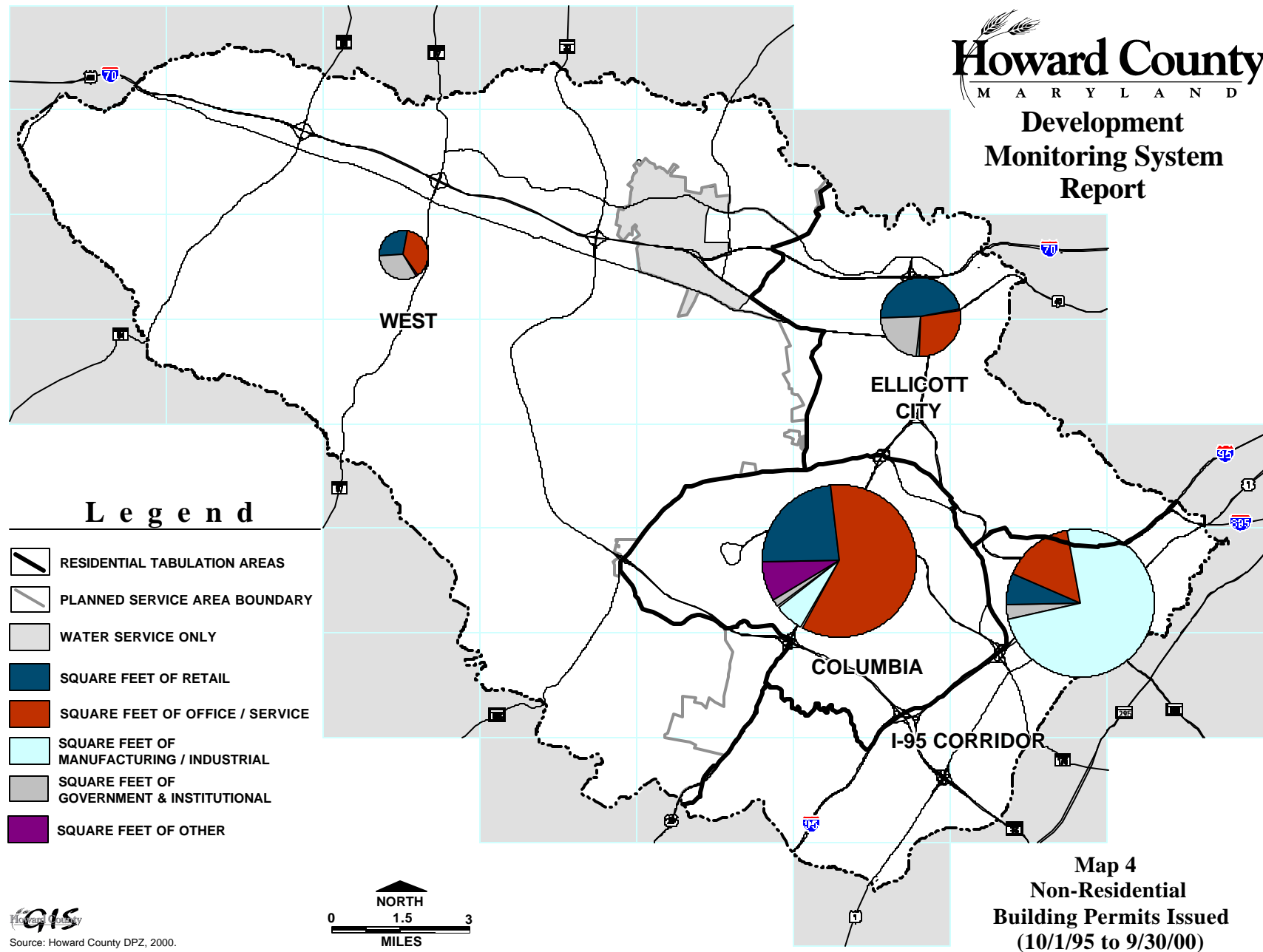
Large projects in process include the Snowden River Business Park and Columbia Gateway in Columbia and the Patapsco Valley Business Park and the Blue Stream Corporate Center in the I-95 Corridor.

## Site Development Plans

### *Approved Plans*

Over the last five years in the County, 472 non-residential lots in 364 site development plans totaling 4,944 acres were approved. This equates to a five year average of about 990 acres per year. Last year, there were 758 acres approved, slightly less than the five year average.





Over the five year period almost 15.9 million square feet of building space was approved in site development plans, an average of about 3.2 million square feet per year. Last year, 3.3 million square feet were approved.

About half of the total 15.9 million square feet over the last five years was in Columbia and about 30 percent was in the I-95 Corridor. About 12 percent of the total was in Ellicott City and 7 percent in the West. Last year, about 41 percent of the total 3.3 million square feet of approved building space was in the I-95 Corridor and 35 percent was in Columbia. Ellicott City and the West each had about 12 percent of the total square footage.

Of the total 15.9 million square feet, about 38 percent or 6.1 million square feet was for manufacturing/extensive industrial uses. About 33 percent or 5.2 million square feet was for office/service space. Retail space accounted for about 21 percent of the total (3.3 million square feet) and government and institutional space was about 7 percent of the total (1.2 million square feet). This compares to last year's breakdown of about 52 percent office/service space, 30 percent manufacturing/extensive industrial, 10 percent government and institutional space and 8 percent retail space.

Some of the larger projects approved last year include a large office development at the former Horse Farm at MD 108 and Snowden River Parkway, the new high school in Fulton, and commercial development at the Mall in Columbia.

### ***Plans in Process***

Seventy-one non-residential lots totaling about 1,259 acres were in the site development plan process as of September 30, 2000. This is about the same amount as the 1,227 acres in process one year earlier. The total building square footage in these plans is 2.7 million square feet, about 28 percent more than 2.1 million square feet in process a year earlier.

Similar to the approved plans, most of the square footage for plans in process is for manufacturing/extensive industrial and office/service space concentrated in Columbia and the I-95 Corridor.

Large plans in process (over 100,000 square feet) include 2 projects in Co-

lumbia Gateway and several projects in the I-95 Corridor – Troy Hill Corporate Center, Lyndwood Square, Dorsey Run Industrial Park and Prologis Park in Troy Hill.

### **Building Permits**

Countywide since October 1, 1995, 946 non-residential building permits were issued for about 14.4 million square feet of building space. This equates to a five year average of about 2.9 million square feet per year. Last year, 181 building permits totaling 3.1 square feet were issued.

About 41 percent of the total 14.4 million square feet over the last five years was in Columbia and about 39 percent was in the I-95 Corridor. About 14 percent of the total was in Ellicott City and 6 percent in the West. This general trend continued last year with about 45 percent of the total 3.1 million square feet issued in Columbia, 32 percent in the I-95 Corridor, 16 percent in Ellicott City and 7 percent in the West.

Of the total 14.4 million square feet, about 39 percent or 5.6 million square feet was for office/service space. About 32 percent or 4.6 million square feet was for manufacturing/extensive industrial space. Retail space accounted for about 21 percent of the total (3.0 million square feet) and government and institutional space was about 7 percent of the total (1.1 million square feet). This compares to last year's breakdown of about 49 percent office/service space, 28 percent manufacturing/extensive industrial, 18 percent retail space and 5 percent government and institutional space.

Some of the larger projects over 100,000 square feet include a distribution/warehouse building in the Meadowridge Business Park, an office building at the former Horse Farm at MD 108 and Snowden and a warehouse building at the Baltimore Washington Industrial Park. All of these are located in the I-95 Corridor. The new Home Depot in Chatham Station in Ellicott City is also over 100,000 square feet.

# Highlights

## Residential Development

- Over the last five years, residential building completions, measured by use and occupancy permits, have averaged about 2,000 new units per year. This is less than the 1990 General Plan annual target of 2,500 new units.
- Last year, there were 792 lots recorded, 1,565 units approved in site development plans, 2,418 building permits issued and 2,494 use and occupancy permits issued. These results can be compared to the respective five year averages: 1,602 lots recorded, 1,617 units approved in site development plans, 2,195 issued building permits and 2,000 issued use and occupancy permits. Last year, lots recorded and approved units in site development plans were *lower* than their five year average, whereas issued building permits and use and occupancy permits were *greater* than their five year average.
- As indicated by issued building permits, the percentage of single family detached units over the last five years is around 60 percent, higher than the 51 percent projected in the 1990 General Plan. The percentage of single family attached units is about 10 percent less than the 32 percent General Plan target, and the percentage of apartment units is close to the 16 percent General Plan target.
- The Northeast, North and West regions have had the greatest number of issued building permits over the last five years, with the majority of units being single family units. The Southeast, Columbia East and Columbia West have had relatively less issued building permits. Columbia West and Columbia East have had greater percentages of higher density housing – townhouses and apartments – compared to the rest of the County.
- The residential plans in the development pipeline reflect the impact of the General Plan policies. Areas that have had excessive demand for residential development are being relieved by the Adequate Public Facilities Ordinance. All available allocations for the North were

granted for plans on the waiting list when the current allocation year began in July and as of September 30, 2000 there are 239 units on hold in the North.

## Preservation

- Last year, 848 acres of agricultural and environmentally sensitive land were permanently preserved. All of this preserved acreage is a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations.
- Since 1992, 7,198 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 71 percent of this total, 5,125 acres, has gone into preservation and permanent open space. The remaining 29 percent, 2,073 acres, has been or is planned for development on 1,585 lots and 179 acres of roadway.

## Non-Residential Development

- Last year, the State reported 7,193 new jobs, significantly more than the 3,040 annual average as targeted in the 1990 General Plan.
- An estimated 8,450 jobs could be accommodated in building space in last year's approved site development plans. Total jobs from building permits issued last year amount to about 7,400.
- Over the last five years, according to State data about 31,400 new jobs have been created in the County. This is more than double the five year 1990 General Plan target of 15,200 new jobs.
- Last year about 3.3 million square feet of building space was approved in site development plans. Issued building permits accounted for about 3.1 million square feet. Over the last five years, the average annual amount was 3.2 million square feet in approved site development plans and 2.9 million square feet in issued building permits.
- Most of the new building space is located in Columbia and the I-95 Corridor. Comparably less space was planned in Ellicott City and the West.

- Most of the overall development is for office/service and manufacturing/extensive industrial uses. The office/service space is concentrated in Columbia whereas the manufacturing/extensive industrial space is concentrated in the I-95 Corridor.
- Approved and in-process non-residential site development plans and issued building permits indicate that the office/service and manufacturing/extensive industrial sectors will continue to be the major areas of new employment growth.



# Residential Development

## Recorded Residential Subdivisions

The development process in Howard County usually begins with the subdivision of land. Depending upon the size and type of subdivision, the process may include:

- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review involving only a final plan.

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units in the County, such as apartment buildings on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1995. Therefore, the number of recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential *plans* recorded, the number of potential *units* from recorded lots, and the *acreage* of plans recorded have been compiled by the regions shown on Map 5. Annual data for development activity are reported for the period October 1 through September 30.

### Summary of Last Year's Results

Last year there were 792 housing units from recorded lots countywide in 168 subdivision plans totaling about 2,661 acres (Table 1). The North region had the most units with 338, or 43 percent of the total. The West had 30 percent of the total with 237 units. These represent *net new unit* potential and do not include total recordations from resubdivisions. For example, in a few cases resubdivisions combine existing lots to create a smaller number of new lots compared to the original.

Of the total 168 subdivision plans recorded last year, 50 percent were in the West, followed by 21 percent in the North, and 20 percent in the Northeast. The remaining 9 percent of plans were in Columbia East, the Southeast, and Columbia West.

Of the total 2,661 acres recorded, 2,241 acres, or 84 percent, were in the West. It should be noted, however, that of the 2,241 recorded acres in the West, about 780 acres (35 percent) were for plats sending or receiving density.

Table 2 shows new units from recorded lots by unit type. Of the 792 recorded lots, 503 are for single family detached units (SFD) and the remaining 289 are for single family attached (SFA) or townhouse units. This represents 64 percent and 36 percent of the total units, respectively. There were no apartment and mobile home units recorded last year.

### Last Year's Projects - Greater than 30 Lots

Of the total 792 units from lots recorded last year, 440 or about 56 percent were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 3, are located in three of the six regions – Columbia West, North, and the West. The precise location of these plans are shown on Map 5.

Of the 130 units from recorded lots in Columbia West last year, 127 of them were for condominium townhouses from one subdivision plan in

**Table 1**  
**Recorded Residential Subdivisions, 10/01/99 to 9/30/00**

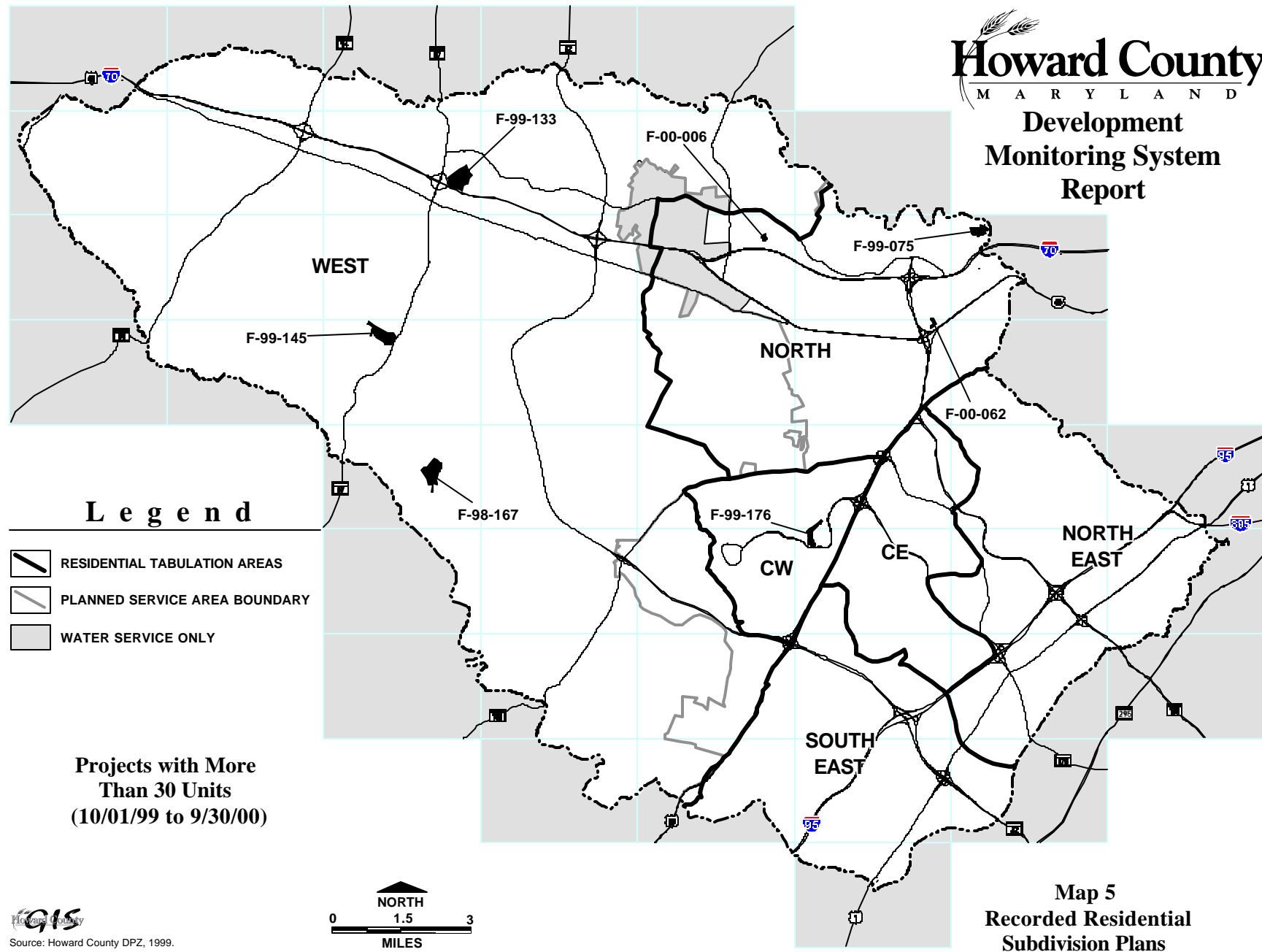
Region	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Northeast	57	7%	33	20%	93	3%
Columbia East	9	1%	2	1%	4	0%
Southeast	21	3%	10	6%	19	1%
Columbia West	130	16%	4	2%	23	1%
North	338	43%	35	21%	281	11%
West	237	30%	84	50%	2,241	84%
<b>TOTAL</b>	<b>792</b>	<b>100%</b>	<b>168</b>	<b>100%</b>	<b>2,661</b>	<b>100%</b>

**Table 2**  
**Unit Potential from Recorded Lots by Unit Type, 10/01/99 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL
Northeast	50	7	0	0	57
Columbia East	9	0	0	0	9
Southeast	21	0	0	0	21
Columbia West	3	127	0	0	130
North	183	155	0	0	338
West	237	0	0	0	237
<b>TOTAL</b>	<b>503</b>	<b>289</b>	<b>0</b>	<b>0</b>	<b>792</b>
<b>PERCENT</b>	<b>64%</b>	<b>36%</b>	<b>0%</b>	<b>0%</b>	<b>100%</b>

**Table 3**  
**Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/99 to 9/30/00**

Region	File Number	Plan Name	Unit Type	Lots	Total
Columbia West	F-99-176	Town Center	SFA	127	127
North	F-00-062	Howard's Ridge	SFA	87	181
	F-00-006	GTW's Waverly Woods	SFA	53	
	F-99-075	Hollifield Estates	SFD	41	
West	F-99-133	Monticello	SFD	51	132
	F-98-167	High Forest Estates	SFD	49	
	F-99-145	Cattail Ridge	SFD	32	
<b>TOTAL</b>					<b>440</b>





Town Center. In the North, 181 of the total 338 lots, or 53 percent, were in subdivisions with more than 30 units. These lots are located in Howard's Ridge, Waverly Woods and Hollifield Estates. In the West, 132 of the total 237 lots, or 56 percent, were recorded in larger subdivisions. These include units in Monticello, High Forest Estates, and Cattail Ridge.

## Five Year Results

Table 4 shows the recorded subdivisions for the last five years from October 1, 1995 to September 30, 2000. Over this five year period lots for 8,021 units countywide in 775 subdivision plans totaling about 16,264 acres were recorded. This equates to a five year average of 1,604 units per year.

Over the five year period, 37 percent of the units were in the West, 27 percent were in the North, 13 percent were in the Northeast, 10 percent were in Columbia East, 8 percent were in Columbia West, and 5 percent were in the Southeast.

Table 5 shows the total residential acreage recorded for each of the last five years. Since October, 1995 16,264 acres have been recorded, an average of about 3,250 acres per year. This represents all residential lots including resubdivisions and sending and receiving preservation parcels. The majority of the acreage, 66 percent, was recorded in the West. The North had the next greatest acreage recorded at 24 percent of the total. The remaining four regions – Northeast, Columbia East, Southeast, and Columbia West – comprised the remaining 1,521 recorded acres over the five year period.

**Table 4**  
**Recorded Residential Subdivisions, 10/01/95 to 9/30/00**

Region	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Northeast	1,070	13%	132	17%	970	6%
Columbia East	777	10%	28	4%	161	1%
Southeast	370	5%	55	7%	218	1%
Columbia West	651	8%	39	5%	172	1%
North	2,168	27%	146	19%	3,947	24%
West	2,985	37%	375	48%	10,796	66%
<b>TOTAL</b>	<b>8,021</b>	<b>100%</b>	<b>775</b>	<b>100%</b>	<b>16,264</b>	<b>100%</b>

Table 6 summarizes the number of units from recorded lots by unit type for each of the last five years. The five year total by unit type is also shown in the bottom right hand corner of the table. Over the last five years, recorded lots created the potential for 4,916 single family detached units, 61 percent of the total 8,021. A total of 1,700, 21 percent, were single family attached units, and the remaining 1,405, 18 percent, were for apartments units. This compares to the current existing unit breakdown of 54 percent, 21 percent, and 23 percent for single family detached, single family attached, and apartment units, respectively. (As indicated earlier, these represent *net new unit* potential from recordations and do not include totals from resubdivisions. For example, in a few cases resubdivisions combine existing lots to create a smaller number of new lots compared to the original.)

**Table 5**  
**Recorded Residential Acreage, 10/01/95 to 9/30/00**

Region	10/95-9/96	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	TOTAL	PERCENT
Northeast	126	221	120	410	93	970	6%
Columbia East	105	10	1	42	4	161	1%
Southeast	28	43	28	99	19	218	1%
Columbia West	83	29	35	2	23	172	1%
North	1,088	1,665	294	619	281	3,947	24%
West	2,007	1,988	1,654	2,905	2,241	10,796	66%
<b>TOTAL</b>	<b>3,438</b>	<b>3,956</b>	<b>2,132</b>	<b>4,077</b>	<b>2,661</b>	<b>16,264</b>	<b>100%</b>

**Table 6**  
**Unit Potential from Recorded Lots by Unit Type, 10/01/95 to 9/30/00**

10/95 to 9/96					
Region	SFD	SFA	APT	MH	TOTAL
Northeast	69	118	0	0	187
Columbia East	27	293	426	0	746
Southeast	45	0	0	0	45
Columbia West	66	0	0	0	66
North	310	7	0	0	317
West	556	0	0	0	556
<b>TOTAL</b>	<b>1,073</b>	<b>418</b>	<b>426</b>	<b>0</b>	<b>1,917</b>
<b>PERCENT</b>	<b>56%</b>	<b>22%</b>	<b>22%</b>	<b>0%</b>	<b>100%</b>

10/96 to 9/97					
SFD	SFA	APT	MH	TOTAL	
249	0	0	0	249	
4	0	0	0	4	
76	39	0	0	115	
9	0	318	0	327	
164	649	162	0	975	
784	140	342	0	1,266	
<b>1,286</b>	<b>828</b>	<b>822</b>	<b>0</b>	<b>2,936</b>	
<b>44%</b>	<b>28%</b>	<b>28%</b>	<b>0%</b>	<b>100%</b>	

10/97 to 9/98					
Region	SFD	SFA	APT	MH	TOTAL
Northeast	150	54	0	0	204
Columbia East	0	0	0	0	0
Southeast	40	0	0	0	40
Columbia West	38	0	88	0	126
North	151	7	69	0	227
West	386	0	0	0	386
<b>TOTAL</b>	<b>765</b>	<b>61</b>	<b>157</b>	<b>0</b>	<b>983</b>
<b>PERCENT</b>	<b>78%</b>	<b>6%</b>	<b>16%</b>	<b>0%</b>	<b>100%</b>

10/98 to 9/99					
SFD	SFA	APT	MH	TOTAL	
340	33	0	0	373	
18	0	0	0	18	
149	0	0	0	149	
2	0	0	0	2	
240	71	0	0	311	
540	0	0	0	540	
<b>1,289</b>	<b>104</b>	<b>0</b>	<b>0</b>	<b>1,393</b>	
<b>93%</b>	<b>7%</b>	<b>0%</b>	<b>0%</b>	<b>100%</b>	

10/99 to 9/00					
Region	SFD	SFA	APT	MH	TOTAL
Northeast	50	7	0	0	57
Columbia East	9	0	0	0	9
Southeast	21	0	0	0	21
Columbia West	3	127	0	0	130
North	183	155	0	0	338
West	237	0	0	0	237
<b>TOTAL</b>	<b>503</b>	<b>289</b>	<b>0</b>	<b>0</b>	<b>792</b>
<b>PERCENT</b>	<b>64%</b>	<b>36%</b>	<b>0%</b>	<b>0%</b>	<b>100%</b>

TOTAL 10/95 to 9/00					
SFD	SFA	APT	MH	TOTAL	
858	212	0	0	1,070	
58	293	426	0	777	
331	39	0	0	370	
118	127	406	0	651	
1,048	889	231	0	2,168	
2,503	140	342	0	2,985	
<b>4,916</b>	<b>1,700</b>	<b>1,405</b>	<b>0</b>	<b>8,021</b>	
<b>61%</b>	<b>21%</b>	<b>18%</b>	<b>0%</b>	<b>100%</b>	

Chart 8 is a graphical representation of recorded lots by unit type over the last five year.

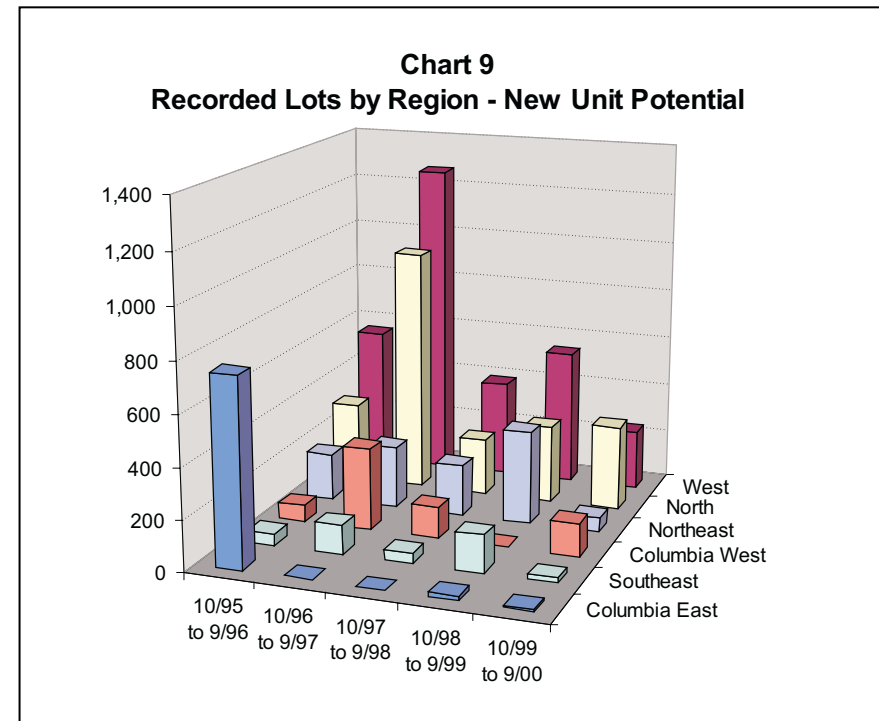
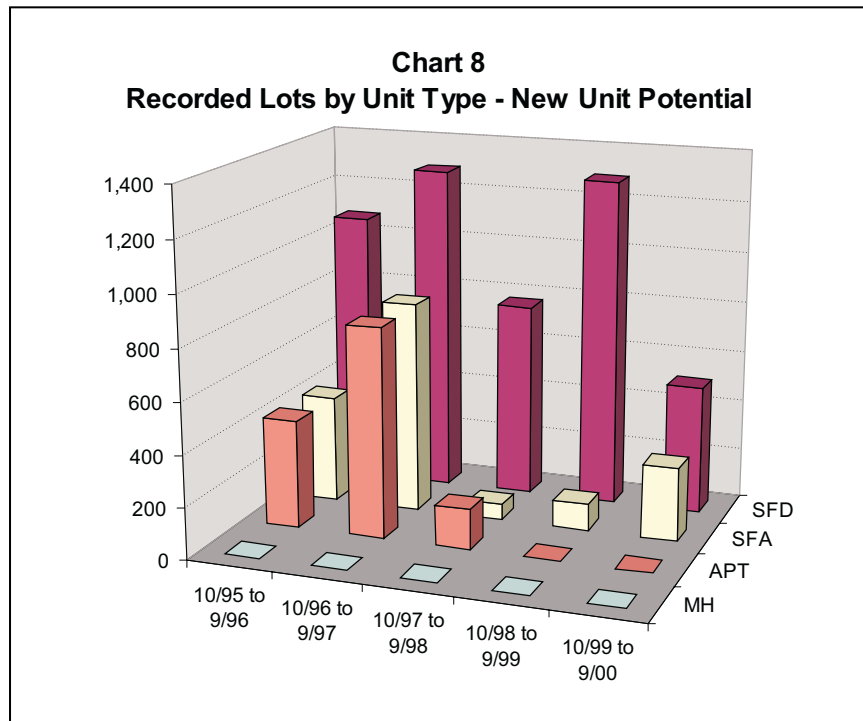
### Last Year Compared to Five Year Trends

Last year resulted in the smallest number of new units from recorded lots with 792. This compares to 1,917, 2,936, 983, and 1,393 units for each of the 4 previous years, respectively, and is about half of the 1,604 five year average.

Although there could be many factors impacting this reduction, one likely contributing reason is the closing of the Ilchester school district in the Northeast for the 2001 allocation year and the closure of the entire Northeast region for the 2002 allocation year. Given the three year development timeframe from the initial plan stage to built units as described in the APFO legislation, the 2001 and 2002 allocation years represent the 1998 and 1999 plan review years. Hence, closure of the Northeast during these years

could cause a reduction of recorded lots in 2000. This is apparent by comparing the number of lots recorded in the Northeast last year, 57, to the previous years where 187, 249, 204, and 373 lots were recorded in 1994/95 to 1998/99, respectively.

Chart 9 shows the results graphically by region. All of the regions except the North and Columbia West had reductions in the number of units from recorded lots last year compared to the recent past. The North had a gradual increase since the 97/98 year and Columbia West had an increase last year compared to the previous year. It is important to note that the maximum number of allocations have been granted in the North each year since 1996 resulting in the region being closed and projects being put on hold.



## In-Process Residential Subdivisions

As indicated in the previous section, the development process in Howard County usually begins with the subdivision of land. Depending upon the size and type of subdivision, the process may include:

- a minor subdivision review;
- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan.

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of September 30, 2000 are tabulated and compared with those in process a year earlier (as of September 30, 1999).

### Number of Plans

Twenty more residential plans were in process as of September 30, 2000 than one year earlier, 151 plans compared to 131 plans (Table 7). All regions except the West have more plans in process this year compared to

last. The largest increase is the Southeast with 20 plans in process this year compared to only 7 the previous. The West shows a drop from 48 plans to 44 plans.

The West has the greatest number of plans in process, followed by the North and Northeast. Columbia East and Columbia West have the fewest number of plans in process. In general, the West has smaller projects with less units per project. So a large number of plans does not necessarily translate into a large number of potential units as shown in the section below.

### Number of Potential Units

Similar to the number of plans, there were more potential units in process as of September 30, 2000 compared to a year earlier, 5,340 units compared to 4,887 units (Table 8). The North has the largest number of units in process in 2000 with 1,990, or 37 percent, of the countywide total. This is followed by the Southeast and Northeast with 1,741 (32 percent) and 1,046 (20 percent) units in process, respectively. The West, Columbia East and Columbia West regions have the remaining 563 units in process (11 percent).

**Table 7**  
**Number of Residential Subdivision Plans in Process, 09/30/00 and 09/30/99**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Northeast	12	13	2	1	5	4	16	20	35	38
Columbia East	0	1	0	1	0	1	2	5	2	8
Southeast	3	4	0	4	0	3	4	9	7	20
Columbia West	0	0	1	0	0	0	2	3	3	3
North	8	8	2	1	7	4	19	25	36	38
West	4	5	5	0	3	8	36	31	48	44
<b>TOTAL</b>	<b>27</b>	<b>31</b>	<b>10</b>	<b>7</b>	<b>15</b>	<b>20</b>	<b>79</b>	<b>93</b>	<b>131</b>	<b>151</b>

**Table 8**  
**Number of Potential Units from Subdivision Plans in Process, 09/30/00 and 09/30/99**

Region	Single Family Detached		Single Family Attached		Apartments		Mobile Homes		TOTAL UNITS	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Northeast	719	1,007	46	39	0	0	219	0	984	1,046
Columbia East	12	132	0	0	0	0	0	0	12	132
Southeast	447	821	500	670	250	250	0	0	1,197	1,741
Columbia West	7	4	0	0	200	0	0	0	207	4
North	578	479	602	456	844	1,055	0	0	2,024	1,990
West	463	427	0	0	0	0	0	0	463	427
<b>TOTAL</b>	<b>2,226</b>	<b>2,870</b>	<b>1,148</b>	<b>1,165</b>	<b>1,294</b>	<b>1,305</b>	<b>219</b>	<b>0</b>	<b>4,887</b>	<b>5,340</b>

Of the total 5,340 units in process, 50 are on hold in the waiting bin because allocations are no longer available in the North for the current allocation year. Additional projects in the North may be added to the waiting list this year upon signature approval of sketch, preliminary equivalent sketch plans or minor subdivision final plans.

Projects may also be added to the open/closed waiting bin for the recently re-closed Northeast region as well as the Bushy Park, Lisbon, Pointer's Run, and Atholton elementary school districts. As of September 30, 2000, 233 units match this criteria and will go into waiting bins upon signature approval this allocation year (30 in the North, 151 in the Northeast, 39 in Bushy Park, 10 in Pointers Run, and 3 in Lisbon).

It is important to note that a significant number of the 5,340 potential units in process are part of phased projects with building planned for future years. As shown in Table 9, 3,103 units are part of phased plans, with building planned as far out as 2010 for some projects. This represents 58 percent of the total units in process. The larger phased projects include Turf Valley, Waverly and the Key property.

As indicated in Table 8, the majority of potential units from in process subdivision plans are single family detached. Chart 10 shows the percentage breakdown by unit type for the year 2000. Fifty-four percent of the units in

**Table 9**  
**Potential Units from Phased Projects**

Region	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	TOTAL
Northeast	90	38	37	48	22	5	20	60	65	34	419
Columbia East	0	56	33	13	0	0	0	0	0	0	102
Southeast	240	120	204	120	212	174	120	120	5	0	1,315
Columbia West	0	0	0	0	0	0	0	0	0	0	0
North	0	224	24	0	241	0	581	0	38	159	1,267
West	0	0	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>330</b>	<b>438</b>	<b>298</b>	<b>181</b>	<b>475</b>	<b>179</b>	<b>721</b>	<b>180</b>	<b>108</b>	<b>193</b>	<b>3,103</b>

process are single family units. Twenty-two percent are single family attached units and 24 percent are apartment units. This distribution is almost identical to the current existing unit breakdown in the County of 54 percent, 21 percent, and 23 percent for single family detached, single family attached, and apartment units, respectively. Table 10 shows details by plan stage and unit type for this year and last. Chart 11 graphically illustrates the units in process by unit type for the current year.

**Table 10**  
**Number of Potential Units from Subdivision Plans in Process by Unit Type, 09/30/00 and 09/30/99**

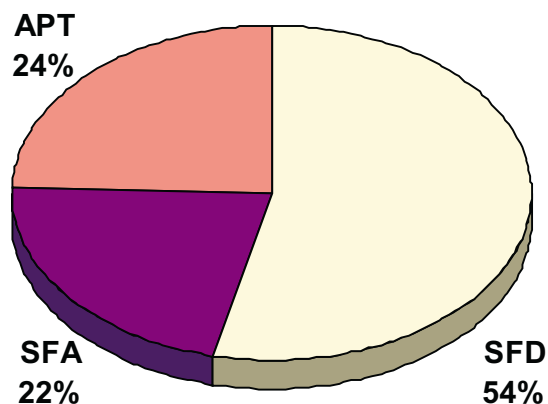
09/30/00 ==>						Sketch					Preliminary Equivalent Sketch				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	465	39	0	0	504	5	0	0	0	5					
Columbia East	13	0	0	0	13	22	0	0	0	22					
Southeast	344	510	250	0	1,104	71	160	0	0	231					
Columbia West	0	0	0	0	0	0	0	0	0	0					
North	183	258	832	0	1,273	22	0	0	0	22					
West	68	0	0	0	68	0	0	0	0	0					
TOTAL	1,073	807	1,082	0	2,962	120	160	0	0	280					

09/30/00 ==>						Preliminary					Final					TOTAL - 09/30/00				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	263	0	0	0	263	274	0	0	0	274						1,007	39	0	0	1,046
Columbia East	32	0	0	0	32	65	0	0	0	65						132	0	0	0	132
Southeast	382	0	0	0	382	24	0	0	0	24						821	670	250	0	1,741
Columbia West	0	0	0	0	0	4	0	0	0	4						4	0	0	0	4
North	87	0	125	0	212	187	198	98	0	483						479	456	1,055	0	1,990
West	199	0	0	0	199	160	0	0	0	160						427	0	0	0	427
TOTAL	963	0	125	0	1,088	714	198	98	0	1,010						2,870	1,165	1,305	0	5,340

09/30/99 ==>						Sketch					Preliminary Equivalent Sketch				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	476	39	0	219	734	83	0	0	0	83					
Columbia East	0	0	0	0	0	0	0	0	0	0					
Southeast	430	500	250	0	1,180	0	0	0	0	0					
Columbia West	0	0	0	0	0	5	0	0	0	5					
North	214	367	844	0	1,425	91	0	0	0	91					
West	41	0	0	0	41	82	0	0	0	82					
TOTAL	1,161	906	1,094	219	3,380	261	0	0	0	261					

09/30/99 ==>						Preliminary					Final					TOTAL - 09/30/99				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	85	7	0	0	92	75	0	0	0	75						719	46	0	219	984
Columbia East	12	0	0	0	12	0	0	0	0	0						12	0	0	0	12
Southeast	17	0	0	0	17	0	0	0	0	0						447	500	250	0	1,197
Columbia West	2	0	200	0	202	0	0	0	0	0						7	0	200	0	207
North	172	58	0	0	230	101	177	0	0	278						578	602	844	0	2,024
West	212	0	0	0	212	128	0	0	0	128						463	0	0	0	463
TOTAL	500	65	200	0	765	304	177	0	0	481						2,226	1,148	1,294	219	4,887

**Chart 10**  
**Subdivisions In Process New Unit Potential, 9/30/00**



## Number of Acres

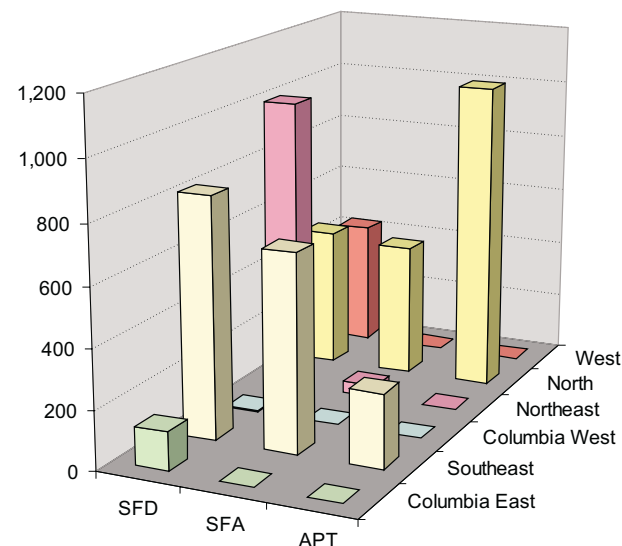
As of September 30, 2000 a total of 4,586 acres of residential land in were in the subdivision process. This is about 1,000 acres more than the previous year, at which time there were 3,589 acres in process (Table 11).

All regions have more acreage in process this year compared to last except Columbia West, which has 5 acres in process compared to 43. For the current year, the West has the most acres in process, followed by the North, Southeast, Northeast, Columbia East, and Columbia West, respectively. For the West, all residential acreage including resubdivisions and sending and receiving preservation parcels are included.

## Major Projects

Table 12 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive or phased projects. Map 6 shows the location of these projects. Some of the larger projects in this list include

**Chart 11**  
**Subdivisions In Process - New Unit Potential**



the Key Property near MD 216 and I-95, which includes 1,145 new units phased through 2009, and Turf Valley with 897 units also phased through 2009.

Most of the units from large projects are planned in the Southeast, primarily due to the Key property project. The North also has a significant number of new units planned from large projects. There are no projects with 50 units or more planned in the West or Columbia West regions.

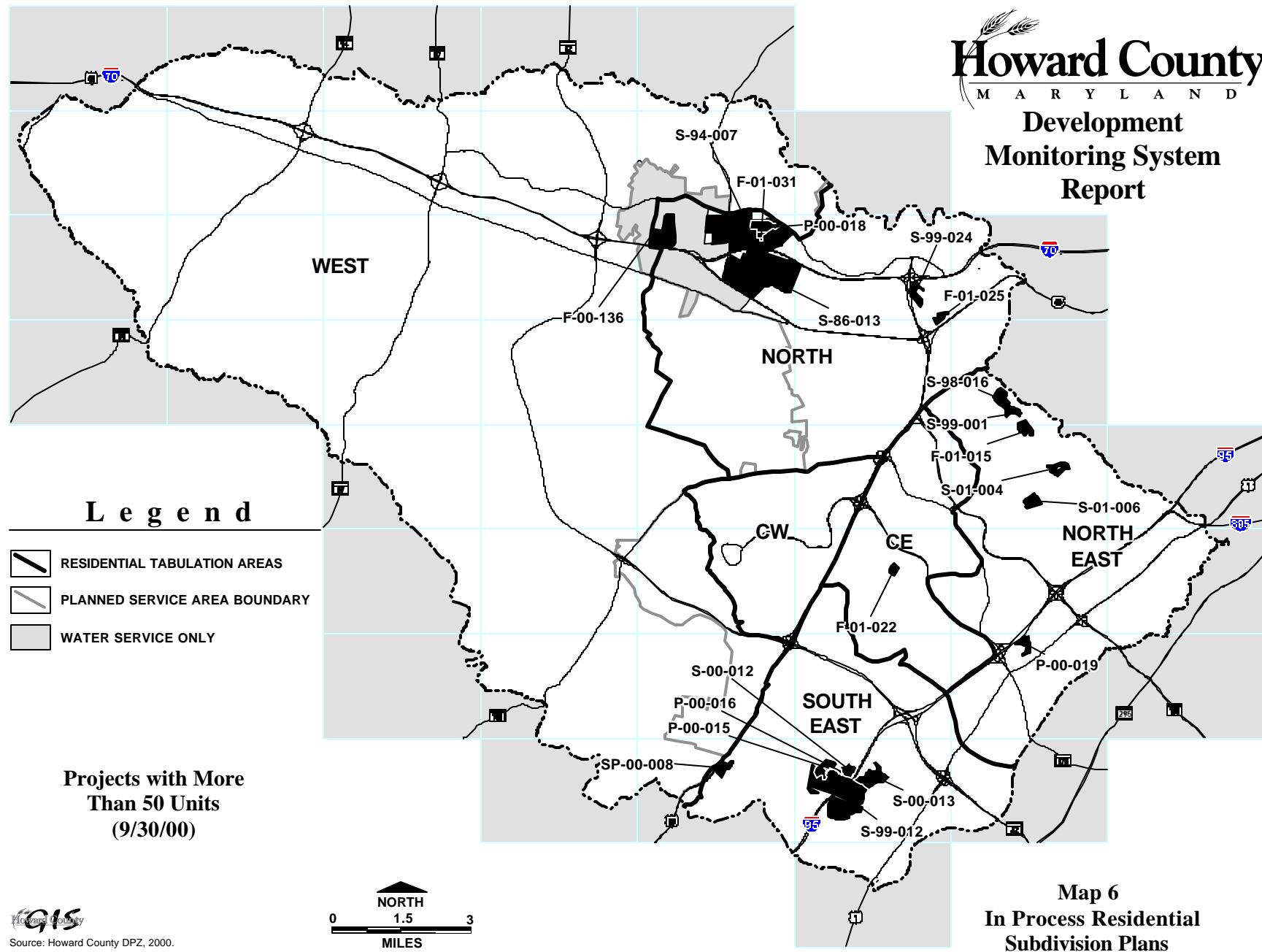
**Table 11**  
**Acreeage of Residential Subdivision Plans in Process, 09/30/00 and 09/30/99**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL ACRES	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Northeast	379	368	54	7	101	99	74	275	608	749
Columbia East	0	2	0	12	0	6	6	29	6	48
Southeast	529	592	0	76	0	124	10	33	540	826
Columbia West	0	0	6	0	0	0	37	5	43	5
North	623	736	164	13	162	197	224	432	1,174	1,377
West	100	179	170	0	90	510	859	893	1,220	1,581
<b>TOTAL</b>	<b>1,632</b>	<b>1,877</b>	<b>394</b>	<b>108</b>	<b>353</b>	<b>935</b>	<b>1,211</b>	<b>1,667</b>	<b>3,589</b>	<b>4,586</b>

**Table 12**  
**In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 09/30/00**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia East	F-01-022	Eckers Hollow	SFD	57	57
North	S-86-013	Turf Valley	Residential	897	1,558
	F-01-025	Kaiser Farm	SFA,APT	176	
	S-99-024	Heartlands Retirement Community	SFA,APT	148	
	F-01-031	GTW'S Waverly Woods	SFA	120	
	S-94-007	Waverly	SFD,SFA,APT	79	
	F-00-136	The Estates at Sand Hill	SFD	78	
	P-00-018	GTW'S Waverly Woods	SFD	60	
Northeast	P-00-019	The Oaks at Waters Edge	SFD	192	646
	S-99-001	Autumn View	SFD,SFA	178	
	S-98-016	Autumn River	SFD,SFA	97	
	S-01-004	Cascade Overlook	SFD	70	
	F-01-015	Autumn View	SFD	56	
	S-01-006	Dennis Preserve	SFD	53	
Southeast	P-00-015	Emerson Section 2 (Key Property)	SFD,SFA	240	1,628
	P-00-016	Emerson Section 2 (Key Property)	SFA	120	
	S-00-012	Emerson (Formerly R-ED West)	SFD,SFA	89	
	S-00-013	Stone Lake (Oak Hill)	SFD,SFA	224	
	S-99-012	Key Property	SFD,SFA,APT	785	
	SP-00-008	Cherrytree Park	SFD,SFA	170	
<b>TOTAL</b>					<b>3,889</b>





# Approved Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Residential SDP's are required for all residential lots 20,000 square feet or less. This threshold is slightly less than a half acre. Many lots, especially in the West, are larger than 20,000 square feet. Consequently, SDP's do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the six school regions. The number of residential site development *plans* approved, the number of non-residential *lots* approved, and the *acreage* of approved plans have been compiled for each of these regions and are discussed below. The analysis includes last year's site development plan activity as well as activity for the last five years.

## Summary of Last Year's Results

Last year there were 1,565 housing units approved in 56 site development plans totaling about 233 acres (Table 13). Columbia West had the most units approved with 638, or 41 percent of the total. The Northeast had 25 percent of the total with 385 approved units, followed by the North with 307 approved units and the West with 206 approved units. The Southeast and Columbia East had 19 and 12 approved units, respectively.

Of the total 56 site development plans approved last year, 23 were in the West, followed by 14 in the North, and 12 in the Northeast. The remaining 7 plans were in Columbia East, the Southeast, and Columbia West.

Of the total 233 residential acres approved through site development plans, 108 acres, or 46 percent, were in the Northeast. A total of 52 acres were approved in the West, followed by 38 acres approved in the North and 30 acres approved in Columbia West. Three acres were approved in both the Southeast and Columbia East regions.

Table 14 shows new units from approved site development plans by unit type. Of the 1,565 approved units, 641 are for single family detached units,

**Table 13**  
**Approved Residential Site Development Plans, 10/01/99 to 9/30/00**

Region	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Northeast	385	25%	12	21%	108	46%
Columbia East	12	1%	3	5%	3	1%
Southeast	17	1%	2	4%	3	1%
Columbia West	638	41%	2	4%	30	13%
North	307	20%	14	25%	38	16%
West	206	13%	23	41%	52	22%
<b>TOTAL</b>	<b>1,565</b>	<b>100%</b>	<b>56</b>	<b>100%</b>	<b>233</b>	<b>100%</b>

**Table 14**  
**Approved Units from SDP's by Unit Type, 10/01/99 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL
Northeast	378	7	0	0	<b>385</b>
Columbia East	12	0	0	0	<b>12</b>
Southeast	17	0	0	0	<b>17</b>
Columbia West	0	88	550	0	<b>638</b>
North	28	207	72	0	<b>307</b>
West	206	0	0	0	<b>206</b>
<b>TOTAL</b>	<b>641</b>	<b>302</b>	<b>622</b>	<b>0</b>	<b>1,565</b>
<b>PERCENT</b>	<b>41%</b>	<b>19%</b>	<b>40%</b>	<b>0%</b>	<b>100%</b>

622 are for apartment units, and the remaining 302 are for single family attached or townhouse units. This represents 41 percent, 40 percent, and 19 percent of the total units, respectively. There were no mobile homes approved in site development plans last year.

**Table 15**  
**Approved Residential SDP's, Projects With More Than 30 Units, 10/01/99 to 9/30/00**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia West	SDP-99-135	Town Center	APT	550	<b>638</b>
	SDP-99-068	Hickory Ridge Elderly Center	SFA Elderly Housing	88	
North	SDP-00-067	Howard's Ridge	SFA	91	<b>272</b>
	SDP-99-072	Selborne House of Dorsey Hall	APT Elderly Housing	72	
	SDP-00-053	The Legends at Turf Valley	SFA	56	
	SDP-00-055	Gtw's Waverly Woods	SFA	53	
Northeast	SDP-97-115	New Colony Village	SFD	90	<b>361</b>
	SDP-99-163	Grovermont	SFD	88	
	SDP-99-164	Grovermont	SFD	78	
	SDP-00-026	Autumn View	SFD	36	
	SDP-00-027	Autumn View	SFD	36	
	SDP-99-141	Scarlet Oaks	SFD	33	
<b>TOTAL</b>					<b>1,271</b>

### Last Year's Projects - Greater than 30 Units

Of the total 1,575 units approved in site development plans last year, 1,271 or about 81 percent were in site development plans consisting of more than 30 units. These larger projects, shown in Table 15, are located in three of the six regions – the Columbia West, North, and Northeast regions. The location of these plans are shown on Map 7.

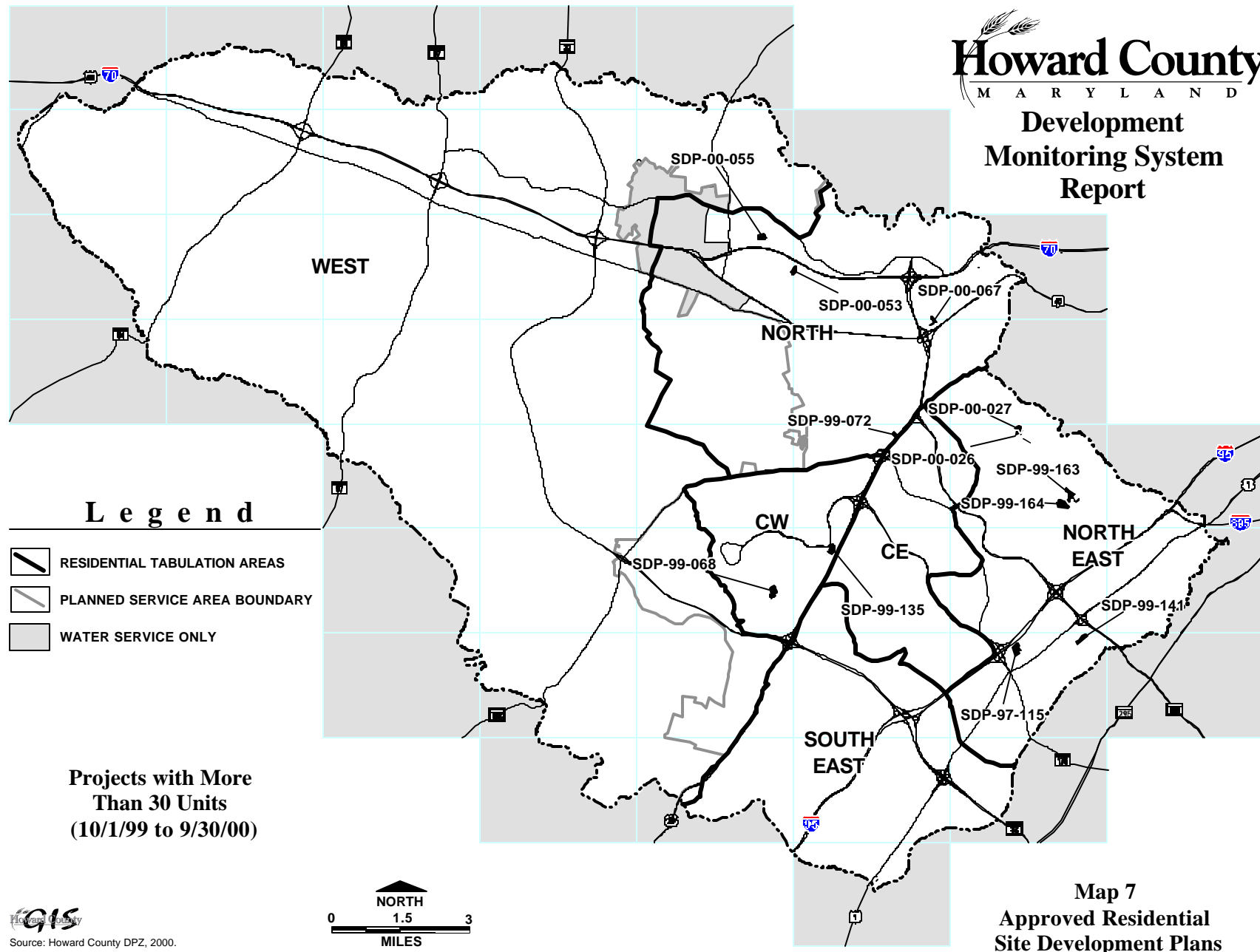
Of the 638 units approved in Columbia West last year, 550 of them were for rental apartments from one plan in Town Center and the other 88 were SFA units as part of the Hickory Ridge Elderly Center. In the North, 272 of the total 307 units were part of plans with more than 30 units. These units are located in Howard's Ridge, the Selborne House of Dorsey Hall, The Legends at Turf Valley and Gtw's Waverly Woods. In the Northeast, 361 of the total 385 units were part of large site development plans. These include units in New Colony Village, Grovermont, Autumn View, and Scarlet Oaks.

### Five Year Results

Table 16 shows the approved residential site development plans for the last five years from October 1, 1995 to September 30, 2000. Over this five year period 7,980 units were approved countywide in 356 site development plans totaling about 1,606 acres. This equates to a five year average of 1,596 units per year.

**Table 16**  
**Approved Residential Site Development Plans, 10/01/95 to 9/30/00**

Region	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Northeast	2,198	28%	78	22%	517	32%
Columbia East	681	9%	16	4%	65	4%
Southeast	675	8%	41	12%	193	12%
Columbia West	1,122	14%	18	5%	82	5%
North	1,868	23%	72	20%	335	21%
West	1,436	18%	131	37%	414	26%
<b>TOTAL</b>	<b>7,980</b>	<b>100%</b>	<b>356</b>	<b>100%</b>	<b>1,606</b>	<b>100%</b>



**Table 16**  
**Acreage in Approved Residential Site Development Plans, 10/01/95 to 9/30/00**

<b>Region</b>	<b>10/95-9/96</b>	<b>10/96-9/97</b>	<b>10/97-9/98</b>	<b>10/98-9/99</b>	<b>10/99-9/00</b>	<b>TOTAL</b>	<b>PERCENT</b>
Northeast	103	189	54	65	108	<b>517</b>	<b>32%</b>
Columbia East	32	0	4	25	3	<b>65</b>	<b>4%</b>
Southeast	73	22	33	62	3	<b>193</b>	<b>12%</b>
Columbia West	20	11	21	0	30	<b>82</b>	<b>5%</b>
North	47	108	43	100	38	<b>335</b>	<b>21%</b>
West	65	101	80	117	52	<b>414</b>	<b>26%</b>
<b>TOTAL</b>	<b>340</b>	<b>430</b>	<b>235</b>	<b>368</b>	<b>233</b>	<b>1,606</b>	<b>100%</b>

Over the five year period, 28 percent of the units were in the Northeast, 23 percent in the North, 18 percent in the West, 14 percent in Columbia West, 9 percent in Columbia East, and 8 percent were in the Southeast.

Table 16 shows the total residential acreage approved in site development plans for each of the last five years. Since October, 1995 1,606 acres have been recorded, an average of about 321 acres per year. The majority of the acreage, 32 percent, was approved in the Northeast. The West had the next greatest acreage approved with 26 percent of the total. The North had 21 percent of the total approved. The remaining three regions – Columbia East, Southeast, and Columbia West – comprised the remaining 340 approved acres over the five year period.

Table 17 summarizes the number of units from recorded lots by unit type for each of the last five years. The five year total by unit type is also shown in the bottom right hand corner of the table.

Over the last five years, approved site development plans created the potential for 4,128 single family detached units, 52 percent of the total 7,980. A total of 2,338, 29 percent, were single family attached units, and the remaining 1,514, 19 percent, were for apartments units. This compares to the current existing unit breakdown of 54 percent, 21 percent, and 23 percent for single family detached, single family attached, and apartment units, respectively.

**Table 17**  
**Approved Units in Residential Site Development Plans, 10/01/95 to 9/30/00**

10/95 to 9/96					
Region	SFD	SFA	APT	MH	TOTAL
Northeast	333	343	23	0	699
Columbia East	26	181	124	0	331
Southeast	80	153	0	0	233
Columbia West	48	0	71	0	119
North	167	0	0	0	167
West	144	0	0	0	144
<b>TOTAL</b>	<b>798</b>	<b>677</b>	<b>218</b>	<b>0</b>	<b>1,693</b>
<b>PERCENT</b>	<b>47%</b>	<b>40%</b>	<b>13%</b>	<b>0%</b>	<b>100%</b>

10/96 to 9/97					
SFD	SFA	APT	MH	TOTAL	
344	211	23	0	578	
0	0	0	0	0	
96	11	0	0	107	
3	0	210	0	213	
140	529	0	0	669	
307	0	0	0	307	
<b>890</b>	<b>751</b>	<b>233</b>	<b>0</b>	<b>1,874</b>	
<b>47%</b>	<b>40%</b>	<b>12%</b>	<b>0%</b>	<b>100%</b>	

10/97 to 9/98					
Region	SFD	SFA	APT	MH	TOTAL
Northeast	245	54	0	0	299
Columbia East	0	15	0	0	15
Southeast	91	39	0	0	130
Columbia West	44	0	108	0	152
North	118	79	0	0	197
West	229	54	0	0	283
<b>TOTAL</b>	<b>727</b>	<b>241</b>	<b>108</b>	<b>0</b>	<b>1,076</b>
<b>PERCENT</b>	<b>68%</b>	<b>22%</b>	<b>10%</b>	<b>0%</b>	<b>100%</b>

10/98 to 9/99					
SFD	SFA	APT	MH	TOTAL	
204	33	0	0	237	
15	108	200	0	323	
188	0	0	0	188	
0	0	0	0	0	
230	165	133	0	528	
435	61	0	0	496	
<b>1,072</b>	<b>367</b>	<b>333</b>	<b>0</b>	<b>1,772</b>	
<b>60%</b>	<b>21%</b>	<b>19%</b>	<b>0%</b>	<b>100%</b>	

10/99 to 9/00					
Region	SFD	SFA	APT	MH	TOTAL
Northeast	378	7	0	0	385
Columbia East	12	0	0	0	12
Southeast	17	0	0	0	17
Columbia West	0	88	550	0	638
North	28	207	72	0	307
West	206	0	0	0	206
<b>TOTAL</b>	<b>641</b>	<b>302</b>	<b>622</b>	<b>0</b>	<b>1,565</b>
<b>PERCENT</b>	<b>41%</b>	<b>19%</b>	<b>40%</b>	<b>0%</b>	<b>100%</b>

TOTAL 10/95 to 9/00					
SFD	SFA	APT	MH	TOTAL	
1,504	648	46	0	2,198	
53	304	324	0	681	
472	203	0	0	675	
95	88	939	0	1,122	
683	980	205	0	1,868	
1,321	115	0	0	1,436	
<b>4,128</b>	<b>2,338</b>	<b>1,514</b>	<b>0</b>	<b>7,980</b>	
<b>52%</b>	<b>29%</b>	<b>19%</b>	<b>0%</b>	<b>100%</b>	

## In Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of *plans*, potential *units* and *acreage* currently being processed as of September 30, 2000 are tabulated and compared with those in process a year earlier (as of September 30, 1999). As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the tables shown in this section do not include some units proposed in the West.

### Number of Plans

About the same number of residential site development plans were in process as of September 30, 2000 compared to one year earlier, 27 plans compared to 25 plans (Table 18). The greatest difference is the North region, with 10 plans in process this year compared to only 4 the previous year.

As of September 30, 2000, the Northeast and North regions had the greatest number of plans in process with 10 each, followed by the West with 5 plans in process. Columbia West and Columbia East each had only 1 plan in process. The Southeast had no plans in process.

**Table 18**  
**Number of Residential SDP's In Process, 09/30/99 & 09/30/00**

Region	1999	2000
Northeast	11	10
Columbia East	1	1
Southeast	1	0
Columbia West	2	1
North	4	10
West	6	5
<b>TOTAL</b>	<b>25</b>	<b>27</b>

### Number of Potential Units

There were less potential units in process as of September 30, 2000 compared to a year earlier, 1,028 units compared to 1,564 units (Table 19). The North had the largest number of units in process in 2000 with 304, or 30 percent of the countywide total. This is followed by the Northeast and West with 286 (28 percent) and 255 (25 percent) units in process, respectively. The Columbia East and Columbia West regions had the remaining

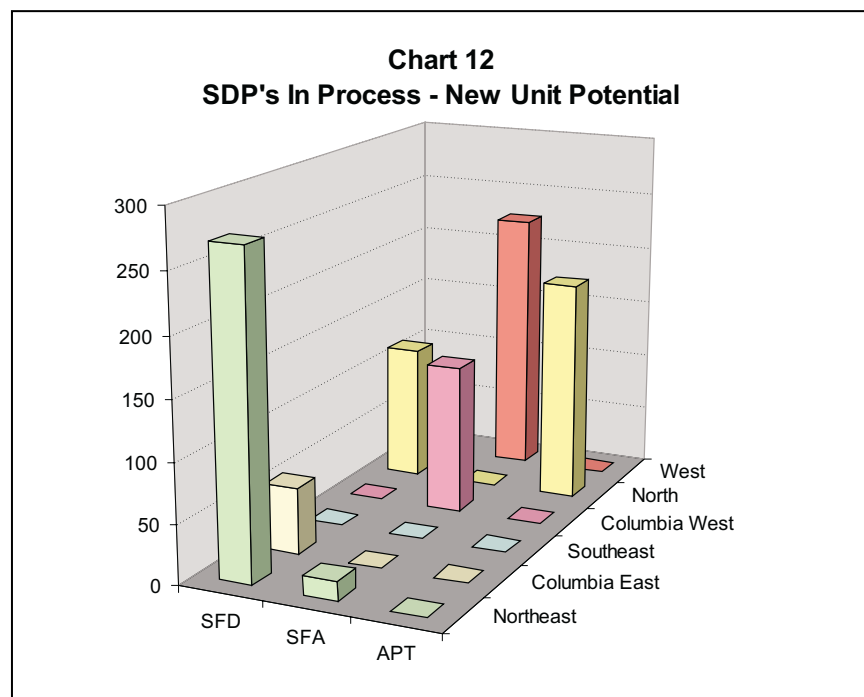
**Table 19**  
**Number of Potential Units from Site Development Plans in Process, 09/30/00 and 09/30/99**

Region	Single Family Detached		Single Family Attached		Apartments		Mobile Homes		TOTAL UNITS	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Northeast	571	270	7	16	0	0	0	0	578	286
Columbia East	1	56	0	0	0	0	0	0	1	56
Southeast	1	0	0	0	0	0	0	0	1	0
Columbia West	0	0	88	127	550	0	0	0	638	127
North	35	115	0	0	162	189	0	0	197	304
West	41	30	108	225	0	0	0	0	149	255
<b>TOTAL</b>	<b>649</b>	<b>471</b>	<b>203</b>	<b>368</b>	<b>712</b>	<b>189</b>	<b>0</b>	<b>0</b>	<b>1,564</b>	<b>1,028</b>

183 units in process (18 percent). The Southeast had no units in process as of September 30, 2000.

Of the total 1,028 units in process, 189 are on hold in the waiting bin because allocations are no longer available in the North for the current allocation year. Additional projects in the North may be added to the waiting list this allocation year upon an SDP being technically complete and which has not yet received any tentative allocations through the subdivision process.

As indicated in Table 19, the greatest number of units in process are single family detached with 471 proposed units in 2000. This is followed by 368 proposed single family attached units and 189 proposed apartment units. Chart 12 graphically illustrates the units in process by unit type for the current year. (As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the table and chart do not include some units proposed in the West.)



## Number of Acres

As of September 30, 2000 a total of 194 acres of residential land were in the site development plan process. This is about 64 acres less than the previous year, at which time there were 257 acres in process (Table 20).

The greatest difference is in the Northeast, where there were only 45 acres in process in site development plans as of September 30, 2000 compared to 133 acres in process the year before. The West, North and Columbia East had 75, 48, and 18 residential acres in process as of September 30, 2000, respectively, an increase over last years in each case. Columbia West only had 8 acres in process in 2000 compared to 30 acres in 1999. The Southeast had no site development plan acreage in process for both years.

**Table 20**  
**Acreage of Residential SDP's In Process, 09/30/99 & 09/30/00**

Region	1999	2000
Northeast	133	45
Columbia East	0	18
Southeast	0	0
Columbia West	30	8
North	25	48
West	69	75
<b>TOTAL</b>	<b>258</b>	<b>194</b>

## Major Projects

Table 21 shows a list of potential units from larger projects with 30 units or more. Map 8 shows the location of these projects. Of the 1,028 units in the site development plan process, 879 or about 85 percent were in projects with 30 units or more.

The North had 240 units in process as part of larger projects, followed by the Northeast with 231 and the West with 225. Larger projects in the North include the Hollifield Estates and the Howard County Medical Research Park elderly housing. The Northeast includes new units in New Colony

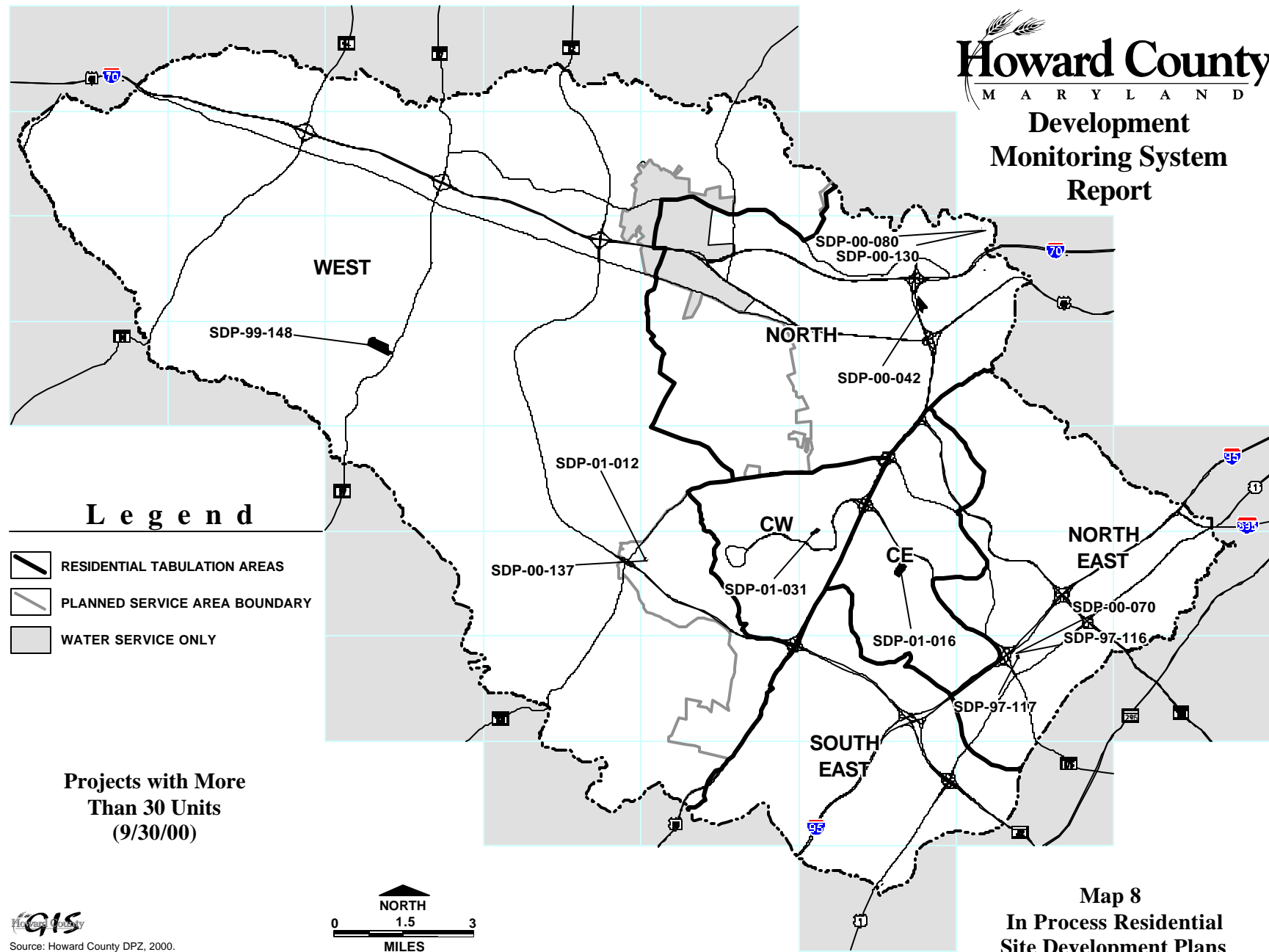


**Table 21**  
**In Process Residential Site Development Plans, Projects With More Than 30 Units, 9/30/00**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia East	SDP-01-016	Eckers Hollow	SFD	56	<b>56</b>
Columbia West	SDP-01-031	Town Center	SFA	127	<b>127</b>
North	SDP-00-042	Howard County Medical Research Park	Elderly Housing	162	<b>240</b>
	SDP-00-080	Hollifield Estates	SFD	39	
	SDP-00-130	Hollifield Estates	SFD	39	
Northeast	SDP-97-117	New Colony Village	SFD	129	<b>231</b>
	SDP-00-070	New Colony Village	SFD	51	
	SDP-97-116	New Colony Village	SFD	51	
West	SDP-99-148	The Villas At Cattail Creek	SFA	108	<b>225</b>
	SDP-01-012	Village of River Hill	SFA	61	
	SDP-00-137	Village of River Hill	SFA	56	
<b>TOTAL</b>					<b>879</b>

Village, and the West includes units in the Village of River Hill and the Villas At Cattail Creek. (Note that for the Villas At Cattail Creek there have been proposed changes since September 30, 2000, the reporting period for this report.)

There are also 127 single family attached units in the site development plan process in Town Center (Columbia West), and 56 units in process in Columbia East as part of Eckers Hollow.



# Residential Building Permits & Use and Occupancy Permits

The final stage of the development process is the issuance of building permits. In Howard County, building permits are required for all construction. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by the six school regions.

## Issued Building Permits

### Summary of Last Year's Results

Last year from October 1, 1999 to September 30, 2000, the County issued 2,418 residential building permits for new construction (Table 22). Of all regions, the West had the most building permits issued with 656, 27 percent of the total. This is closely followed by the North and Columbia West regions with 604 and 603 permits issued, respectively, representing about 25 percent of the total each. There were 322 permits issued in the Northeast, 154 in the Southeast and 79 in Columbia East.

Countywide, almost 60 percent of the permits were for single family units. About 27 percent were for apartment units and 14 percent were for single family attached units. No permits for mobile homes were issued last year.

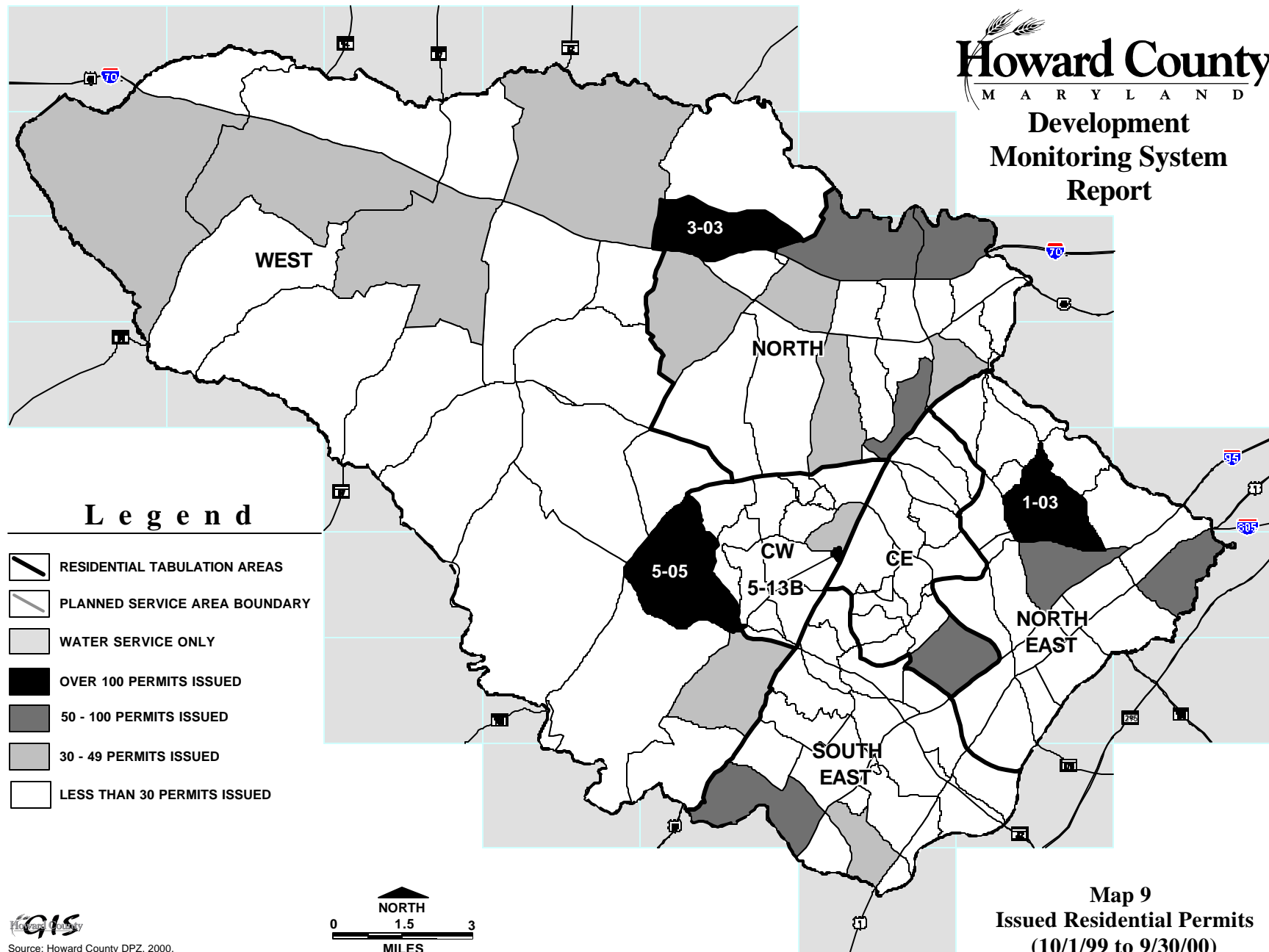
Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	306	16	0	0	322	13%
Columbia East	21	58	0	0	79	3%
Southeast	154	0	0	0	154	6%
Columbia West	13	11	579	0	603	25%
North	310	222	72	0	604	25%
West	621	35	0	0	656	27%
<b>TOTAL</b>	<b>1,425</b>	<b>342</b>	<b>651</b>	<b>0</b>	<b>2,418</b>	<b>100%</b>
<b>PERCENT</b>	<b>59%</b>	<b>14%</b>	<b>27%</b>	<b>0%</b>	<b>100%</b>	

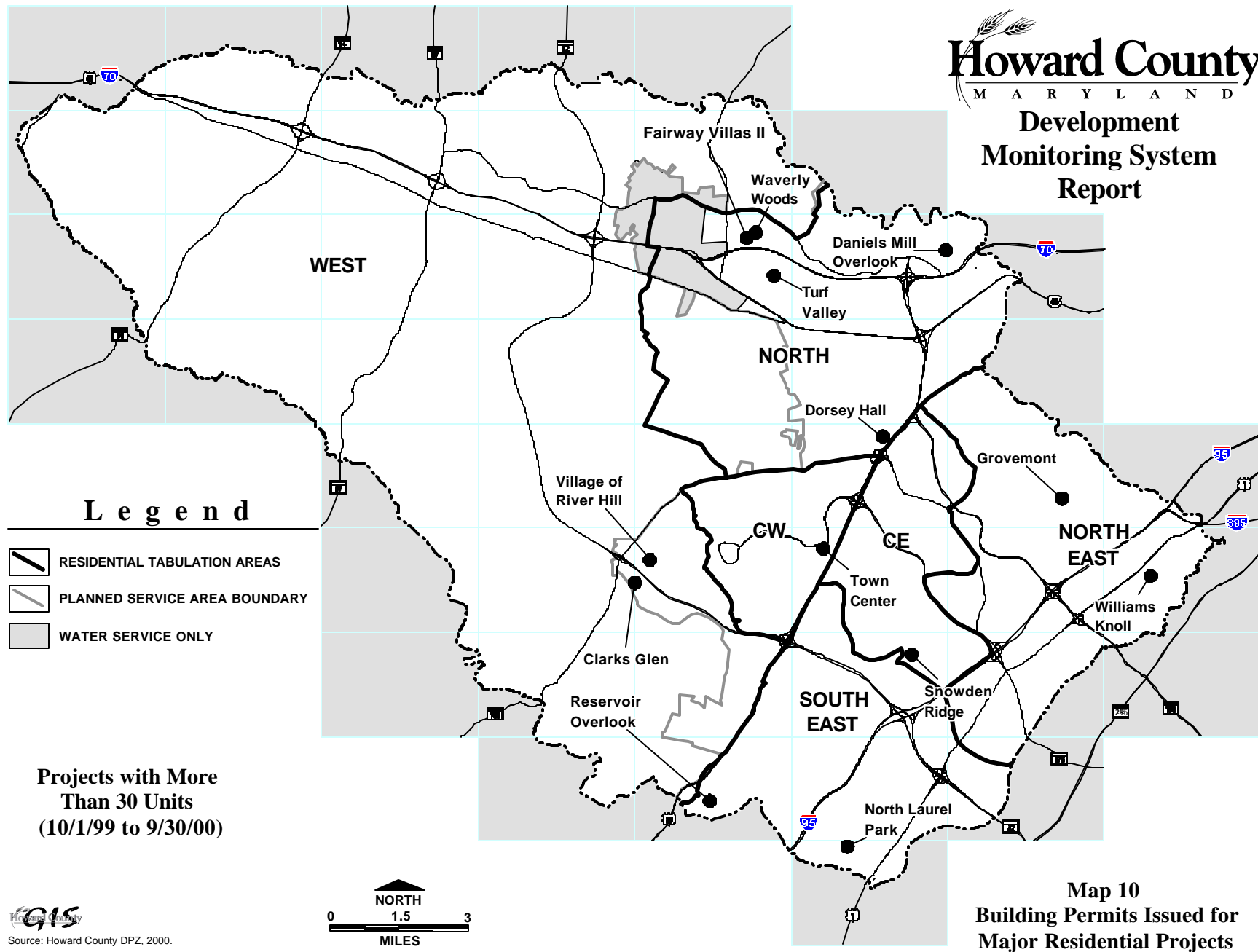
Map 9 shows the building permit activity by statistical area of the County. Statistical areas 1-03, 3-03, 5-05 and 5-13B each had more than 100 permits issued. Statistical area 5-13B had the greatest number with 531 issued permits, followed by statistical areas 5-05 and 3-03 with 263 and 177 issued permits, respectively. Statistical area 1-03 had 107 issued permits. The map indicates the activity in the remaining statistical areas for various ranges.

### Last Year's Projects - Greater Than 30 Units

Table 23 summarizes the issued residential building permits in larger subdivisions with more than 30 units. About 55 percent, or 1,335 of the total 2,418 permits issued last year, fall into this category. Map 10 shows the locations of each of the subdivisions.

Subdivision	Region	Type	Units	TOTAL
Town Center	CW	APT	579	<b>651</b>
Dorsey Hall	N	APT	72	
Waverly Woods	N	SFA	112	
Snowden Ridge	CE	SFA	57	
Fairway Villas II	N	SFA	49	
Turf Valley	N	SFA	35	<b>253</b>
VRH	W	SFD	188	
Grovemont	NE	SFD	57	
Daniels Mill Overlook	N	SFD	52	
North Laurel Park	SE	SFD	36	
Clarks Glen	W	SFD	33	<b>431</b>
Reservoir Overlook	SE	SFD	33	
Williams Knoll	NE	SFD	32	
<b>TOTAL</b>				<b>1,335</b>



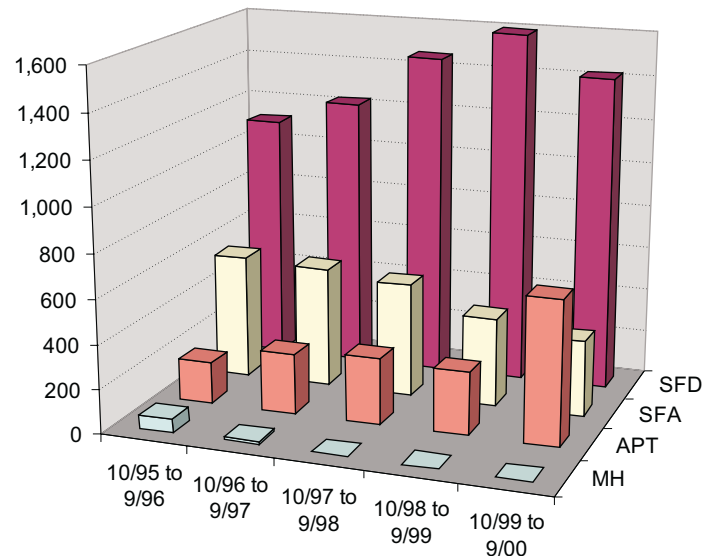


### Five Year Results

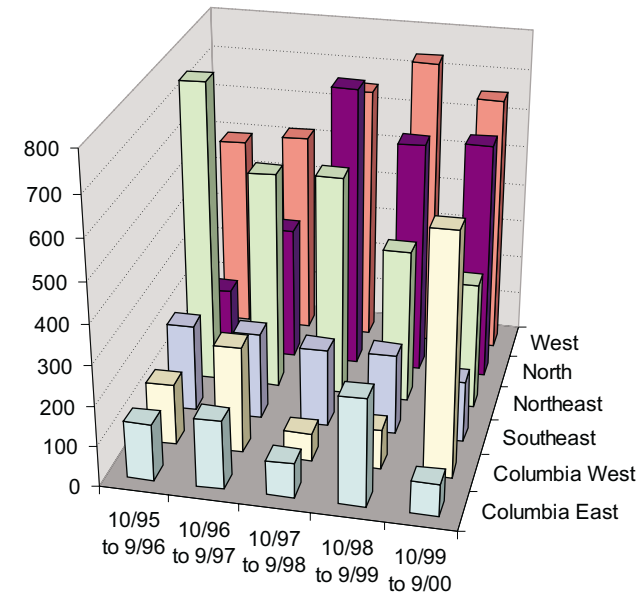
Over five years, from October 1, 1995 to September 30, 2000, a total of 10,977 residential building permits have been issued in Howard County (Table 24). This is an average of about 2,200 permits per year. The five year trends indicate a steady increase in the number of issued permits per year, from 1,929 permits in 1995/96 to 2,418 permits in 1999/00.

Of the 10,977 total permits issued over five years, 6,833, or 62 percent, were for single family detached units. There were 2,370 permits (22 percent) for single family attached units, 1,697 permits (15 percent) for apartment units and 77 permits for mobile homes. Chart 13 shows the results by unit type graphically over time. One apparent trend is the gradual decrease in the number of SFA permits and the increase in SFD permits (except for the last year where SFD permits drop). Permits for apartment units show a general increase over time.

**Chart 13**  
**Residential Building Permits Issued by Unit Type**



**Chart 14**  
**Residential Building Permits Issued by Region**



Over the five year period, the West had the greatest number of permits issued with 3,056. This is followed by the Northeast with 2,585 permits issued and the North with 2,410. Columbia West had the next greatest number with 1,190. The Southeast and Columbia East had the least number of permits issued with 988 and 748, respectively. These five year results by region are shown graphically in Chart 14.

### Use and Occupancy Permits

#### Summary of Last Year's Results

Last year from October 1, 1999 to September 30, 2000, the County issued 2,494 use and occupancy permits (Table 25). Of all regions, the North had the most with 730, 29 percent of the total. This is closely followed by the West with 718 issued use and occupancy permits. The Northeast had 494 issued permits (20 percent), followed by Columbia East, the Southeast and

**Table 24**  
**Issued Residential Building Permits by Unit Type, 10/01/95 to 9/30/00**

10/95 to 9/96						10/96 to 9/97				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	328	330	48	59	765	308	214	16	14	552
Columbia East	6	124	12	0	142	14	109	48	0	171
Southeast	111	106	0	3	220	120	97	0	0	217
Columbia West	73	0	79	0	152	57	0	210	0	267
North	105	4	48	0	157	211	129	0	0	340
West	493	0	0	0	493	517	0	0	1	518
<b>TOTAL</b>	<b>1,116</b>	<b>564</b>	<b>187</b>	<b>62</b>	<b>1,929</b>	<b>1,227</b>	<b>549</b>	<b>274</b>	<b>15</b>	<b>2,065</b>
<b>PERCENT</b>	<b>58%</b>	<b>29%</b>	<b>10%</b>	<b>3%</b>	<b>100%</b>	<b>59%</b>	<b>27%</b>	<b>13%</b>	<b>1%</b>	<b>100%</b>

10/97 to 9/98						10/98 to 9/99				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	392	143	24	0	559	324	63	0	0	387
Columbia East	14	37	36	0	87	11	30	228	0	269
Southeast	108	72	16	0	196	167	34	0	0	201
Columbia West	45	0	24	0	69	63	0	36	0	99
North	264	253	201	0	718	373	198	20	0	591
West	642	10	0	0	652	662	75	0	0	737
<b>TOTAL</b>	<b>1,465</b>	<b>515</b>	<b>301</b>	<b>0</b>	<b>2,281</b>	<b>1,600</b>	<b>400</b>	<b>284</b>	<b>0</b>	<b>2,284</b>
<b>PERCENT</b>	<b>64%</b>	<b>23%</b>	<b>13%</b>	<b>0%</b>	<b>100%</b>	<b>70%</b>	<b>18%</b>	<b>12%</b>	<b>0%</b>	<b>100%</b>

10/99 to 9/00						TOTAL 10/95 to 9/00				
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Northeast	306	16	0	0	322	1,658	766	88	73	2,585
Columbia East	21	58	0	0	79	66	358	324	0	748
Southeast	154	0	0	0	154	660	309	16	3	988
Columbia West	13	11	579	0	603	251	11	928	0	1,190
North	310	222	72	0	604	1,263	806	341	0	2,410
West	621	35	0	0	656	2,935	120	0	1	3,056
<b>TOTAL</b>	<b>1,425</b>	<b>342</b>	<b>651</b>	<b>0</b>	<b>2,418</b>	<b>6,833</b>	<b>2,370</b>	<b>1,697</b>	<b>77</b>	<b>10,977</b>
<b>PERCENT</b>	<b>59%</b>	<b>14%</b>	<b>27%</b>	<b>0%</b>	<b>100%</b>	<b>62%</b>	<b>22%</b>	<b>15%</b>	<b>1%</b>	<b>100%</b>

**Table 25**  
**Issued Use and Occupancy Permits by Unit Type, 10/01/99 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	382	105	7	0	494	20%
Columbia East	11	52	214	0	277	11%
Southeast	174	5	0	0	179	7%
Columbia West	28	0	68	0	96	4%
North	467	191	72	0	730	29%
West	646	72	0	0	718	29%
<b>TOTAL</b>	<b>1,708</b>	<b>425</b>	<b>361</b>	<b>0</b>	<b>2,494</b>	<b>100%</b>
<b>PERCENT</b>	<b>69%</b>	<b>17%</b>	<b>15%</b>	<b>0%</b>		

Columbia West regions with 277, 179 and 96 issued permits, respectively.

Countywide, almost 70 percent of the permits were for single family units. About 17 percent were for single family attached units and 15 percent were for apartment units. No permits for mobile homes were issued last year.

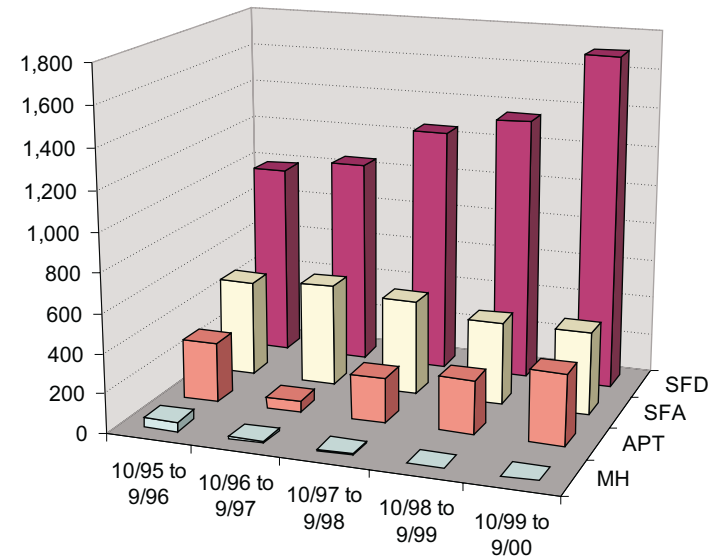
### Five Year Results

Over five years, from October 1, 1995 to September 30, 2000, a total of 9,993 use and occupancy permits have been issued in Howard County (Table 26). This is an average of about 2,000 permits per year.

Of the 9,993 total permits issued over five years, 6,355, or 64 percent, were for single family detached units. There were 2,347 permits (23 percent) for single family attached units, 1,224 permits (12 percent) for apartment units and 67 permits for mobile homes. Chart 15 shows the results by unit type graphically over time. Similar to building permits, one apparent trend is the gradual decrease in the number of SFA permits and the increase in SFD permits. Permits for apartment units show a general increase over time.

Over the five year period, the Northeast and West had the greatest number of permits issued with 2,780 and 2,762, respectively. This is followed by the North with 1,996 permits issued and the Southeast with 1,011. Columbia East and Columbia West had least number of permits issued with 831 and 613, respectively. These five year results by region are shown graphi-

**Chart 15**  
**Use & Occupancy Permits Issued by Unit Type**



cally in Chart 16. The chart clearly shows the increasing trend in the number of issued use and occupancy permits in the West and North and the initial decrease and then relative flattening out of issued permits in the Northeast.



**Table 26**  
**Number of Issued Residential Use and Occupancy Permits by Unit Type, 10/01/95 to 9/30/00**

10/95 to 9/96						10/96 to 9/97					
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	
Northeast	324	277	147	49	797	265	267	20	10	562	
Columbia East	4	88	91	0	183	11	143	36	0	190	
Southeast	90	92	60	0	242	107	97	0	0	204	
Columbia West	55	36	0	0	91	72	10	0	0	82	
North	105	1	6	0	112	128	5	0	0	133	
West	410	0	0	0	410	468	0	0	1	469	
<b>TOTAL</b>	<b>988</b>	<b>494</b>	<b>304</b>	<b>49</b>	<b>1,835</b>	<b>1,051</b>	<b>522</b>	<b>56</b>	<b>11</b>	<b>1,640</b>	
<b>PERCENT</b>	<b>54%</b>	<b>27%</b>	<b>17%</b>	<b>3%</b>	<b>100%</b>	<b>64%</b>	<b>32%</b>	<b>3%</b>	<b>1%</b>	<b>100%</b>	

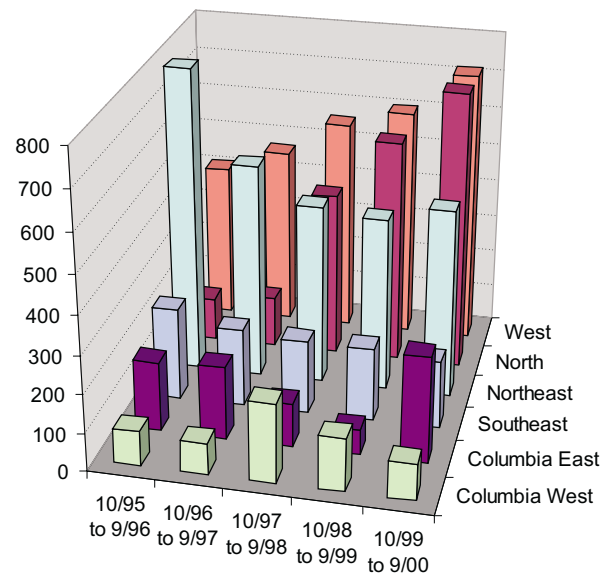
  

10/97 to 9/98						10/98 to 9/99					
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	
Northeast	314	125	26	7	472	332	123	0	0	455	
Columbia East	9	70	36	0	115	8	32	26	0	66	
Southeast	112	81	0	0	193	136	57	0	0	193	
Columbia West	37	0	168	0	205	69	0	70	0	139	
North	228	205	0	0	433	235	176	177	0	588	
West	558	3	0	0	561	570	34	0	0	604	
<b>TOTAL</b>	<b>1,258</b>	<b>484</b>	<b>230</b>	<b>7</b>	<b>1,979</b>	<b>1,350</b>	<b>422</b>	<b>273</b>	<b>0</b>	<b>2,045</b>	
<b>PERCENT</b>	<b>64%</b>	<b>24%</b>	<b>12%</b>	<b>0%</b>	<b>100%</b>	<b>66%</b>	<b>21%</b>	<b>13%</b>	<b>0%</b>	<b>100%</b>	

10/99 to 9/00						TOTAL 10/95 to 9/00					
Region	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	
Northeast	382	105	7	0	494	1,617	897	200	66	2,780	
Columbia East	11	52	214	0	277	43	385	403	0	831	
Southeast	174	5	0	0	179	619	332	60	0	1,011	
Columbia West	28	0	68	0	96	261	46	306	0	613	
North	467	191	72	0	730	1,163	578	255	0	1,996	
West	646	72	0	0	718	2,652	109	0	1	2,762	
<b>TOTAL</b>	<b>1,708</b>	<b>425</b>	<b>361</b>	<b>0</b>	<b>2,494</b>	<b>6,355</b>	<b>2,347</b>	<b>1,224</b>	<b>67</b>	<b>9,993</b>	
<b>PERCENT</b>	<b>69%</b>	<b>17%</b>	<b>14%</b>	<b>0%</b>	<b>100%</b>	<b>64%</b>	<b>23%</b>	<b>12%</b>	<b>1%</b>	<b>100%</b>	

**Chart 16**  
**Use & Occupancy Permits Issued by Region**



# Housing Unit Allocations

Subdivision applications submitted after April 10, 1992 are subject to the Adequate Public Facilities Ordinance (APFO) and may require housing unit allocations. The typical time period between initial subdivision submission and actual construction is three years. Consequently, plan approvals in the FY2000 are granted allocations for the 2003 allocation year. Some submissions contain phasing over several years and are granted allocations for future years, if available. The number of allocations available is established annually by County Council resolution. The allocation chart is based on the General Plan growth projections by school region. Depending upon zoning and plan type, *tentative allocations* are usually assigned upon sketch plan approval. Allocations become *permanent* upon final plat recordation.

In accordance with APFO, since the 1997 allocation year (1994 plan submission year), the allocations have been adjusted to reflect regional development activity using a “rolling average.” The intent of the rolling average is to provide a means to annually adjust the allocation chart to achieve the overall General Plan targets. The rolling average formula uses: 1) the number of allocations granted, 2) the number of lots recorded in projects that were exempt from APFO, and 3) the General Plan target.

Table 27 is the current allocation chart, which the County Council adopted in July 2000. Total allocations are shown by the six school regions. Refer

Region	2003	2004	2005	2006	2007	2008	2009	2010
Northeast	724	717	479	225	154	154	154	154
Columbia East	30	13	68	170	202	202	202	202
Southeast	2,340	1,841	1,187	412	368	368	368	368
Columbia West	815	720	560	264	233	233	233	233
North	234	340	273	234	206	206	206	206
West	876	910	810	613	597	597	597	597
<b>TOTAL</b>	<b>5,019</b>	<b>4,541</b>	<b>3,377</b>	<b>1,918</b>	<b>1,760</b>	<b>1,760</b>	<b>1,760</b>	<b>1,760</b>

to the maps shown earlier in this report for an outline of the regions. From July 2000 to the end of June 2001, the Department of Planning and Zoning may assign year 2003 allocations.

As allowed under APFO, to provide some flexibility, the Planning Director can grant up to 20 percent more allocations than available in each region for the 2003 allocation year. This percentage is established each year by the County Council for the allocation year in question. If this is utilized and more allocations are granted than available for the current allocation year, then available allocations in future years are reduced based on the rolling average. Consequently, areas with strong demand show a decrease in available allocations over time. On the other hand, for areas that do not have strong demand available allocations increase over time.

As of November 30, 2000 1,157 allocations had been granted for the 2003 Allocation Year (Table 28). In the North region all available allocations have been granted including the extra 20 percent. All additional projects in the North are therefore placed in the waiting bin. As of November 30, all the other regions still have available capacity.

Comprehensive and phased subdivisions may request and receive alloca-

**Table 28**  
**Housing Unit Allocations, 2003 Allocation Year**

Region	Possible Allocations		Allocations Granted <sup>1</sup>	Remaining Available
	2003	+ 20%		
Northeast	724	869	186	683
Columbia East	30	36	33	3
Southeast	2,340	2,808	566	2,242
Columbia West	815	978	3	975
North	234	281	281	0
West	876	1,051	88	963
<b>TOTAL</b>	<b>5,019</b>	<b>6,023</b>	<b>1,157</b>	<b>4,866</b>

1. As of November 30, 2000

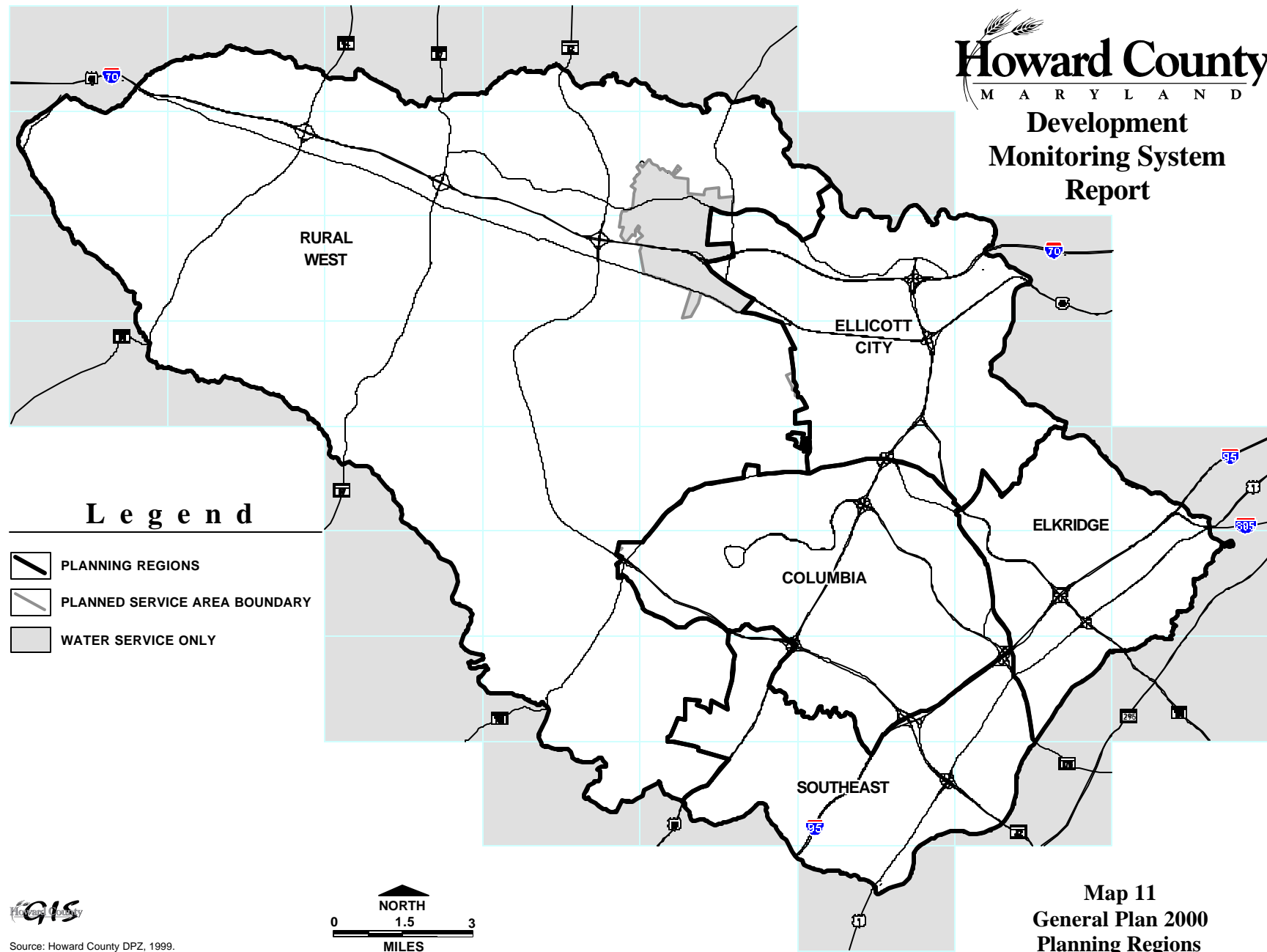
**Table 29**  
**Granted Allocations for Future Years<sup>1</sup>**

<b>Region</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>TOTAL</b>
Northeast	65	22	5	20	60	65	34	271
Columbia East	13	0	0	0	0	0	0	13
Southeast	120	212	174	120	120	5	0	751
Columbia West	0	0	0	0	0	0	0	0
North	0	0	0	40	0	38	79	157
West	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>198</b>	<b>234</b>	<b>179</b>	<b>180</b>	<b>180</b>	<b>108</b>	<b>113</b>	<b>1,192</b>

1. As of November 30, 2000

tions for future years. As of November 30, 2000 a total of 1,192 allocations have been granted for future years (Table 29). These future year allocations have been given to the following subdivisions: Autumn View, Autumn River, Corridor One and Worthington Fields in the Northeast; Cherry Tree Park and the Key Property (Emerson) in the Southeast; Eckers Hollow in Columbia East; and Waverly in the North.

The County Council recently adopted legislation that would change the number of regions from six to five. This change only impacts the allocation regions. The school regions will remain the same and are determined by the School Board. Map 11 shows the new planning regions. A new allocation chart based on these five regions is currently under consideration by the County Council. The new chart will also reflect new growth targets established in the recently adopted General Plan 2000.



## Potential Population

The 1990 General Plan established population targets based on projected household growth. As indicated in the General Plan, households were expected to grow at an average annual rate of 2,740 new units between 1995 and 2000. Based on estimated persons per household figures, and including changes in the household size for the existing housing base, this translates into an average of about 5,960 new residents per year.

Table 30 shows the household size estimates used for the 1990 General Plan for various projection years as well as estimates from the 1990 Census. With information available at the time, certain household size assumptions by unit type were used to forecast population in the 1990 General Plan. It was assumed then that household sizes would decline over time. Subsequent to the 1990 Plan, 1990 Census data showed slightly different household size numbers. Furthermore, regional information showed that household sizes have not declined as expected since 1990. For purposes of this analysis, household size estimates from the 1990 Census have been used to determine population growth from new development. When the 2000 Census data are made available a more accurate determination of current household sizes can be made.

**Table 30**  
**Household Size by Dwelling Unit Type**

Year	SFD	SFA	APT	MH
1990 (1990 General Plan)	3.196	2.608	1.808	2.220
1995 (1990 General Plan)	3.112	2.456	1.806	2.140
2000 (1990 General Plan)	3.028	2.304	2.060	1.804
1990 U.S. Census, Howard County	3.1298	2.5797	1.8711	2.4029

The development pipeline can be analyzed to project expected population growth from new development. As development progresses throughout the process, more exact population estimates based on dwelling unit type are possible. For this report, annual population growth has been estimated from potential housing units at three development stages: 1) recorded sub-

divisions, 2) issued building permits, and 3) issued use and occupancy permits. Table 31 summarizes the estimated population results from new growth for last year as well as the five year average.

**Table 31**  
**Comparison of Housing and Population Estimates**

Category	10/99 to 9/00		10/95 to 9/00 (Annual Ave.)	
	Housing Units	Population	Housing Units	Population
Recorded Lots	792	2,320	1,604	4,480
Building Permits	2,418	6,561	2,195	6,172
U & O Permits	2,494	7,119	1,999	5,680

Based on recorded lots last year from October 1, 1999 to September 30, 2000, there is potential for 2,320 new residents. This compares to a potential population of 6,561 based on the number of issued building permits and an estimated population of 7,119 based on use and occupancy permits issued during the same one year time period.

Over the five year period from October 1, 1995 to September 30, 2000, average annual population growth based on recorded lots is 4,480. Population growth based on the number of issued building permits and use and occupancy permits amounts to 6,172 and 5,680 per year, respectively. More detailed results for each development category are discussed in the sections below.

As indicated earlier in this report, not all potential units go through the subdivision process, so building permits and use & occupancy permits are a more accurate measure of population growth.

### Population Estimates from Recorded Subdivisions

Table 32 shows the potential population from recorded lots by unit type and by region for the 10/99 to 9/00 one year time period. Of the 2,320 po-

**Table 32**  
**Potential Population from Recorded Lots, 10/01/99 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	156	18	0	0	174	8%
Columbia East	28	0	0	0	28	1%
Southeast	66	0	0	0	66	3%
Columbia West	9	328	0	0	337	15%
North	573	400	0	0	973	42%
West	742	0	0	0	742	32%
<b>TOTAL</b>	<b>1,574</b>	<b>746</b>	<b>0</b>	<b>0</b>	<b>2,320</b>	<b>100%</b>
<b>PERCENT</b>	<b>68%</b>	<b>32%</b>	<b>0%</b>	<b>0%</b>	<b>100%</b>	

tential new residents 68 percent will reside in single family detached units and 32 percent in single family attached units. About 42 percent will live in the North, 32 percent in the West, and 15 percent in Columbia West. The remaining 12 percent will live in the Northeast, the Southeast and Columbia East.

For the five years since October 1, 1995, 8,021 lots for new residential units have been recorded. This averages 1,604 new lots per year. Using the household size estimates from the 1990 Census for each unit type, an estimated 22,399 new residents could live in those units (Tables 33 and 34).

Of the total 22,399 residents, 39 percent are located in the West followed

**Table 33**  
**Potential Population from Recorded Lots, 10/01/95 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	2,684	546	0	0	3,230	14%
Columbia East	182	756	797	0	1,735	8%
Southeast	1,036	101	0	0	1,137	5%
Columbia West	369	328	760	0	1,457	7%
North	3,280	2,293	432	0	6,005	27%
West	7,834	361	640	0	8,835	39%
<b>TOTAL</b>	<b>15,385</b>	<b>4,385</b>	<b>2,629</b>	<b>0</b>	<b>22,399</b>	<b>100%</b>
<b>PERCENT</b>	<b>69%</b>	<b>20%</b>	<b>12%</b>	<b>0%</b>	<b>100%</b>	

by 27 percent in the North and 14 percent in the Northeast. The remaining 20 percent would live in Columbia East, Columbia West and the Southeast. As indicated in Table 33, 69 percent of the total population would reside in single family detached units. About 20 percent would live in single family attached units and 12 percent in apartment units.

## Population Estimates from Issued Building Permits

Building permits are generally a more timely and accurate indicator of potential population than recorded lots in subdivision plans. Population estimates in this section differ from previous DMS reports due to canceled

**Table 34**  
**Potential Population from Recorded Lots, 10/01/95 to 9/30/00**

Region	10/95 to 9/96	10/96 to 9/97	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	TOTAL
Northeast	520	779	608	1,149	174	3,230
Columbia East	1,638	13	0	56	28	1,735
Southeast	141	339	125	466	66	1,137
Columbia West	207	623	284	6	337	1,457
North	988	2,490	620	934	973	6,005
West	1,740	3,455	1,208	1,690	742	8,835
<b>TOTAL</b>	<b>5,234</b>	<b>7,699</b>	<b>2,845</b>	<b>4,301</b>	<b>2,320</b>	<b>22,399</b>
<b>PERCENT</b>	<b>23%</b>	<b>34%</b>	<b>13%</b>	<b>19%</b>	<b>10%</b>	<b>100%</b>

building permits and changes in permits issued after the reporting period.

Table 35 shows the potential population from building permits by type and by region for the 10/99 to 9/00 one year time period. Of the 6,561 new residents 68 percent would reside in single family detached units, 13 percent in single family attached units and 19 percent in apartment units. About 31 percent are located in the West, 26 percent in the North, 18 percent in Columbia West and 15 percent in the Northeast. The remaining 10 percent are located in the Southeast and Columbia East.

For the five years since October 1, 1995, 10,977 building permits for new

residential units have been issued. This averages 2,195 permits per year. Using the household size estimates from the 1990 Census for each unit type, an estimated 30,859 new residents could live in those units (Tables 36 and 37).

Of the total 30,859 residents, 31 percent are located in the West followed by 24 percent in the Northeast and 22 percent in the North. The remaining 23 percent would live in Columbia East, Columbia West and the Southeast. As indicated in Table 36, 69 percent of the total population would reside in single family detached units. About 20 percent would live in single family attached units, 10 percent in apartments and 1 percent in mobile homes.

**Table 35**  
**Potential Population from Building Permits, 10/01/99 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	958	41	0	0	999	15%
Columbia East	66	150	0	0	216	3%
Southeast	482	0	0	0	482	7%
Columbia West	41	28	1,083	0	1,152	18%
North	970	573	135	0	1,678	26%
West	1,944	90	0	0	2,034	31%
<b>TOTAL</b>	<b>4,461</b>	<b>882</b>	<b>1,218</b>	<b>0</b>	<b>6,561</b>	<b>100%</b>
<b>PERCENT</b>	<b>68%</b>	<b>13%</b>	<b>19%</b>	<b>0%</b>		

**Table 36**  
**Potential Population from Building Permits, 10/01/95 to 9/30/00**

Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	5,190	1,976	165	176	7,507	24%
Columbia East	207	923	606	0	1,736	6%
Southeast	2,066	797	30	7	2,900	9%
Columbia West	785	28	1,736	0	2,549	8%
North	3,952	2,080	638	0	6,670	22%
West	9,186	309	0	2	9,497	31%
<b>TOTAL</b>	<b>21,386</b>	<b>6,113</b>	<b>3,175</b>	<b>185</b>	<b>30,859</b>	<b>100%</b>
<b>PERCENT</b>	<b>69%</b>	<b>20%</b>	<b>10%</b>	<b>1%</b>		

**Table 37**  
**Potential Population from Issued Building Permits, 10/01/95 to 9/30/00**

Region	10/95 to 9/96	10/96 to 9/97	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	TOTAL
Northeast	2,110	1,580	1,641	1,177	999	7,507
Columbia East	361	415	206	538	216	1,736
Southeast	627	626	554	611	482	2,900
Columbia West	376	571	186	264	1,152	2,549
North	429	993	1,855	1,715	1,678	6,670
West	1,543	1,620	2,035	2,265	2,034	9,497
<b>TOTAL</b>	<b>5,446</b>	<b>5,805</b>	<b>6,477</b>	<b>6,570</b>	<b>6,561</b>	<b>30,859</b>
<b>PERCENT</b>	<b>18%</b>	<b>19%</b>	<b>21%</b>	<b>21%</b>	<b>21%</b>	<b>100%</b>



## Population Estimated from Use and Occupancy Permits

Use and occupancy permits are the most accurate and immediate predictor of new population. A use and occupancy permit is issued upon completion of a residential unit and is required prior to residents moving in.

Table 38 shows the potential population from use and occupancy permits by type and by region for the 10/99 to 9/00 one year time period. Of the 7,119 new residents 75 percent live in single family detached units, 15 percent in single family attached units and 9 percent in apartment units. About 31 percent live in the West, 29 percent in the North, 21 percent in the Northeast and 8 percent each in Columbia East and the Southeast. Only 3

percent are located in Columbia West.

For the five years since October 1, 1995, there have been 9,993 use and occupancy permits issued. This averages about 2,000 per year. Using the household size estimates from the 1990 Census for each unit type, an estimated 28,399 new residents could live in those units (Tables 39 and 40).

Of the total 28,399 new residents, 30 percent live in the West followed by 28 percent in the Northeast and 20 percent in the North. The remaining 22 percent are in Columbia East, Columbia West and the Southeast. About 70 percent of the total would reside in single family detached units. About 21 percent would live in single family attached units, 8 percent in apartments and 1 percent in mobile homes.

Table 38 Potential Population from Use & Occupancy Permits, 10/01/99 to 9/30/00						
Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	1,196	271	13	0	1,480	21%
Columbia East	34	134	400	0	568	8%
Southeast	545	13	0	0	558	8%
Columbia West	88	0	127	0	215	3%
North	1,462	493	135	0	2,090	29%
West	2,022	186	0	0	2,208	31%
<b>TOTAL</b>	<b>5,347</b>	<b>1,097</b>	<b>675</b>	<b>0</b>	<b>7,119</b>	<b>100%</b>
<b>PERCENT</b>	<b>75%</b>	<b>15%</b>	<b>9%</b>	<b>0%</b>	<b>100%</b>	

Table 39 Potential Population from Use & Occupancy Permits, 10/01/95 to 9/30/00						
Region	SFD	SFA	APT	MH	TOTAL	PERCENT
Northeast	5,061	2,314	374	159	7,908	28%
Columbia East	134	994	753	0	1,881	7%
Southeast	1,939	856	112	0	2,907	10%
Columbia West	817	119	572	0	1,508	5%
North	3,642	1,492	477	0	5,611	20%
West	8,300	282	0	2	8,584	30%
<b>TOTAL</b>	<b>19,893</b>	<b>6,057</b>	<b>2,288</b>	<b>161</b>	<b>28,399</b>	<b>100%</b>
<b>PERCENT</b>	<b>70%</b>	<b>21%</b>	<b>8%</b>	<b>1%</b>	<b>100%</b>	

Table 40 Potential Population from Residential Use and Occupancy Permits, 10/01/95 to 9/30/00						
Region	10/95 to 9/96	10/96 to 9/97	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	TOTAL
Northeast	2,122	1,579	1,371	1,356	1,480	7,908
Columbia East	410	470	276	157	568	1,881
Southeast	631	585	560	573	558	2,907
Columbia West	265	251	430	347	215	1,508
North	343	414	1,243	1,521	2,090	5,611
West	1,283	1,467	1,754	1,872	2,208	8,584
<b>TOTAL</b>	<b>5,054</b>	<b>4,766</b>	<b>5,634</b>	<b>5,826</b>	<b>7,119</b>	<b>28,399</b>
<b>PERCENT</b>	<b>18%</b>	<b>17%</b>	<b>20%</b>	<b>21%</b>	<b>25%</b>	<b>100%</b>

# Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from October 1, 1999 to September 30, 2000 has been analyzed and tabulated by unit type. Housing sales from the previous three reporting periods are also shown for comparison purposes (Table 41). The data is graphically represented in Charts 17, 18, and 19.

The cost of housing in Howard County has been increasing steadily, from a mean sales price of \$186,680 in 96/97 to \$226,390 last year for all housing types combined. Most of this increase is reflected in the cost of single family detached homes, with the mean price increasing from \$235,500 four years ago to \$291,500 last year, almost a 24 percent increase. More than half of this increase for single family detached units has occurred in the last year alone. For single family attached units there has been about a 10 percent increase in the mean sales price over the four year time period. This compares to about an 11 percent increase for condos. During this period the number of annual sales have also increased, from 3,744 sales in 96/97 to 5,201 sales in 99/00, a 39 percent increase. These data reflect both new and existing units combined.

It has been indicated by local builders and real estate agents that recently demand has exceeded supply for housing in Howard County, which has contributed to the price increases. The strong economy leading to the growth of personal income as well as growth in dividend income and capital gains from the securities markets has also likely contributed to the price increases.

Map 12 shows the housing sales by zip code in the County. Both the number of sales and the relative mean sales prices are shown.

**Table 41**  
**Housing Sales by Type, 10/01/96 to 9/30/00**

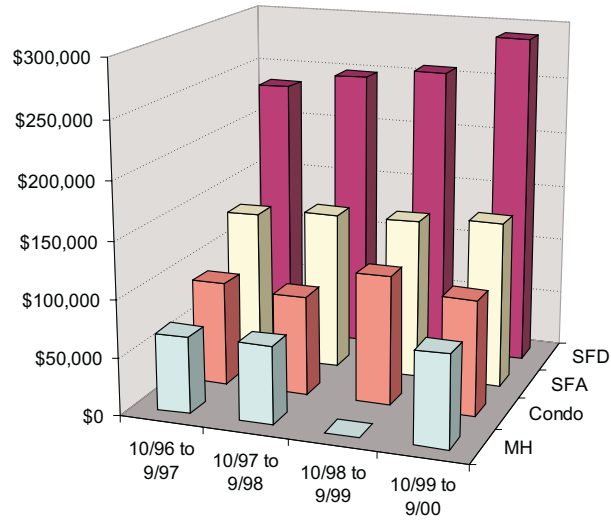
10/96 to 9/97			
Unit Type	# of Sales	Mean	Median
Condo	316	\$90,969	\$84,500
MH	4	\$66,763	\$68,450
SFA	1,320	\$133,076	\$131,000
SFD	2,104	\$235,447	\$219,900
<b>TOTAL</b>	<b>3,744</b>	<b>\$186,680</b>	

10/97 to 9/98			
Unit Type	# of Sales	Mean	Median
Condo	320	\$86,827	\$82,000
MH	3	\$67,966	\$68,000
SFA	1,661	\$139,254	\$136,000
SFD	2,991	\$248,800	\$234,407
<b>TOTAL</b>	<b>4,975</b>	<b>\$201,698</b>	

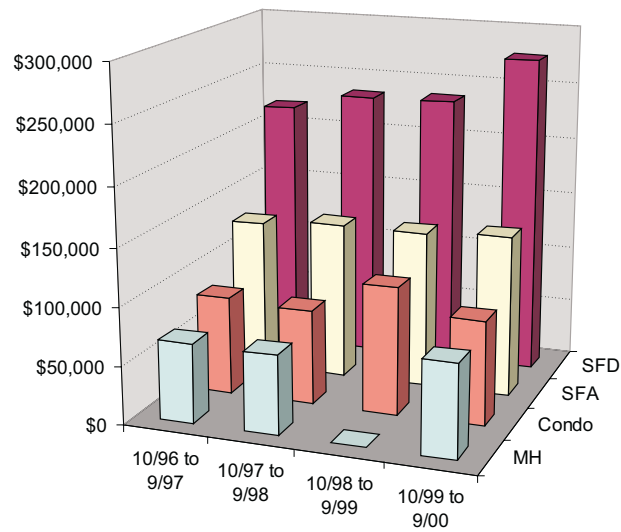
10/98 to 9/99			
Unit Type	# of Sales	Mean	Median
Condo	492	\$113,137	\$110,107
MH	0	\$0	\$0
SFA	1,643	\$140,356	\$136,000
SFD	2,896	\$257,305	\$235,452
<b>TOTAL</b>	<b>5,031</b>	<b>\$205,013</b>	

10/99 to 9/00			
Unit Type	# of Sales	Mean	Median
Condo	432	\$100,702	\$89,900
MH	1	\$79,900	\$79,900
SFA	1,758	\$145,863	\$139,900
SFD	3,010	\$291,510	\$276,418
<b>TOTAL</b>	<b>5,201</b>	<b>\$226,390</b>	

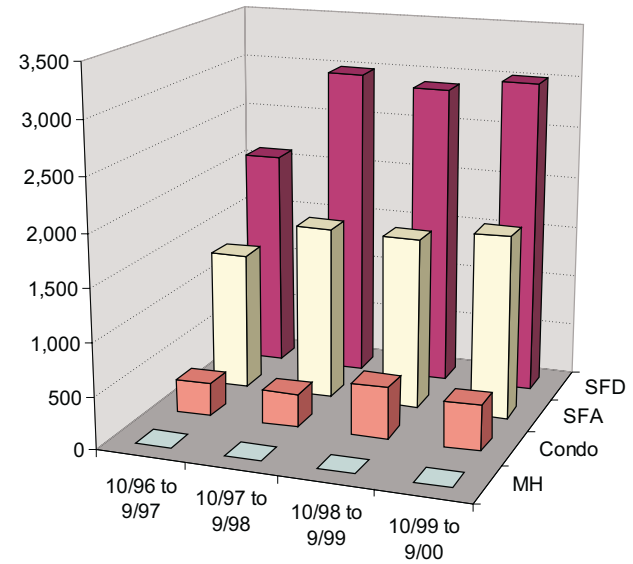
**Chart 17**  
**Mean Sales Price by Unit Type**

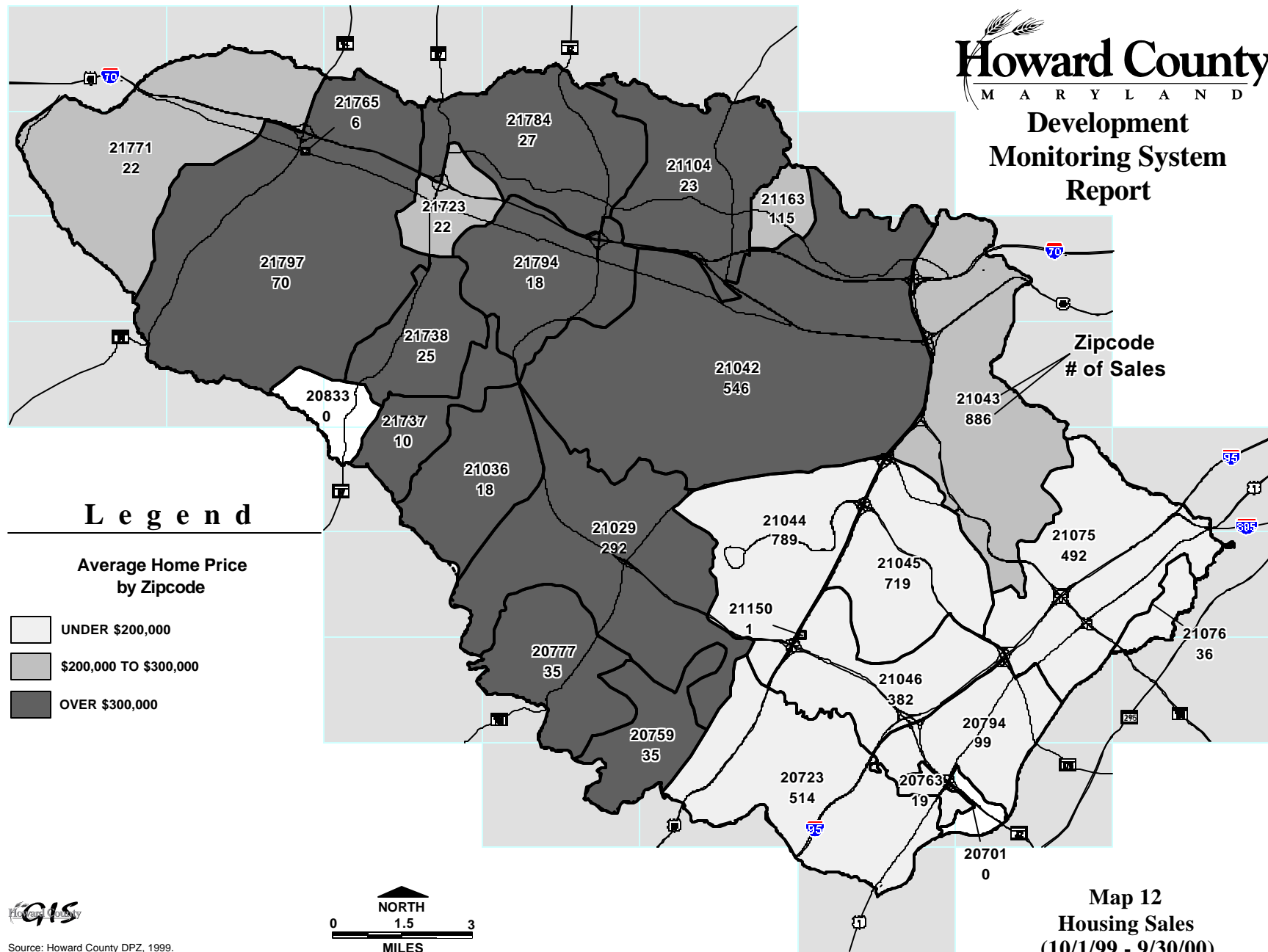


**Chart 18**  
**Median Sales Price by Unit Type**



**Chart 19**  
**Number of Sales by Unit Type**





# Land Preservation

## Agricultural Land Preservation Program

Howard County's Agricultural Land Preservation Program has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the County's Purchase of Development Rights Program (PDR) where a farmer can voluntarily choose to sell a perpetual easement to the County while holding a fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

The County's PDR program began in 1984 and continues today. Beginning in 1980 and continuing until 1988, agricultural land was also preserved through State purchased easements. These State purchases ended in 1988 primarily because of the prohibitive cost of land.

Farmland may also be preserved in the Agricultural Land Preservation Program through the dedication of preservation parcels as part of the development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

The County's PDR program reached its authorized funding limits in FY1997. As a result, there were no agricultural preservation parcels purchased by the County during the time of this reporting period, from October 1, 1999 to September 30, 2000. However, in the Spring of 2000, the County Council authorized an additional \$15 million in funding commitments. This funding will secure permanent easements on 2,500 to 3,000 additional acres over the next few years.

During the latest one year reporting period, 222.61 acres of agricultural preservation parcels were created in subdivisions through the development process and were enrolled in the Agricultural Land Preservation Program. All of these were created through the dedication of sending parcels using the Density/Cluster Exchange Options. These include 57.90 acres on the Moore Property, 20.36 acres on the Keyes Property, and 144.33 acres on

the Cavey Property.

As of September 30, 2000, there were 18,085 acres of permanently preserved agricultural land. This includes 12,801 acres of purchased easements through the County's PDR Program, 3,937 acres of purchased easements by the State and 1,347 preservation acres dedicated as part of the development process (Table 42).

**Table 42**  
**Agricultural Preservation Easements, September 30, 2000**

Type	Acres	Percent
County Purchased Agric. Easements	12,801	71%
State Purchased Agric. Easements	3,937	22%
Dedicated Agric. Preservation Parcels	1,347	7%
<b>TOTAL</b>	<b>18,085</b>	<b>100%</b>

## Dedicated Easement Properties

As previously indicated, last year 222.61 acres of agricultural preservation parcels were created through the development process and were enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 1,347 acres.

Besides agricultural easements, there are additional ways parcels are preserved through the development process. Last year, 625.27 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels, the only other preservation category that received additional acreage. Table 43 shows the land preservation totals from dedicated easements to date including land preserved in the Agricultural Land Preservation Program, as well as joint Howard County/Homeowner's Association parcels and other easement types.

Since 1992, preservation easements on 4,808 acres have been created by cluster development and the Density/Cluster Exchange Options. Including open space, the total comes to 5,125 acres.

**Table 43**  
**Land Preservation Through Dedicated Easements**

<b>Residential Unit Cluster Development</b>	<b>Lots</b>	<b>Acres</b>	
Undeveloped Lots (By Right)	394	492	
Undeveloped Lots (From Density Transfer)	192	218	
<b>Total Undeveloped Lots</b>	<b>586</b>	<b>709</b>	
Developed Lots (By Right)	758	938	
Developed Lots (From Density Transfer)	241	247	
<b>Total Developed Lots</b>	<b>999</b>	<b>1,184</b>	
Roadway		179	
<b>TOTAL</b>	<b>1,585</b>	<b>2,073</b>	<b>28.8%</b>

<b>Open Space and Preservation</b>	<b>Lots</b>	<b>Acres</b>	
Agricultural Preservation	39	1,347	
Howard County/Homeowner's Association	180	2,890	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	20	440	
<b>Total Preservation</b>	<b>244</b>	<b>4,808</b>	
Open Space (County)	10	56	
Open Space (Not Dedicated to County)	49	261	
<b>Total Open Space</b>	<b>59</b>	<b>317</b>	
<b>TOTAL</b>	<b>303</b>	<b>5,125</b>	<b>71.2%</b>

<b>GRAND TOTAL (Includes Res. Develop.)</b>	<b>1,888</b>	<b>7,198</b>	<b>100.0%</b>
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total, or 2,073 acres, is used for the development of residential lots and road right of ways. The remaining 71 percent, or 5,125 acres, is land in dedicated preservation easements and open space as described earlier. Of the 2,073 acres for residential development, about 709 acres are yet undeveloped, 1,184 acres are developed and 179 acres are for roads.

Map 13 shows the preserved land in Howard County as of September 30, 2000 including acquired (purchased) agricultural easements and dedicated agricultural and other preserved parcels.

The majority of the total dedicated preservation easements, 2,890 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 1,347 acres are held by the Howard County Agricultural Land Preservation Program. About 440 acres are jointly held by the Howard County Conservancy and Howard County. The remaining 130 acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society.

Table 43 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 7,198 acres have been subdivided in the rurally zoned land in the West. About 29 percent of this



# Non-Residential Development

## Recorded Non-Residential Subdivisions

For this report, non-residential development is tabulated within four regions as shown on Map 14. The number of non-residential *plans* recorded, the number of non-residential *lots* created, and the *acreage* of plans recorded have been compiled for each of these regions and are discussed below. The analysis includes last year's subdivision activity as well as activity for the last five years.

### Summary of Last Year's Results

Last year there were 125 non-residential lots recorded countywide in 57 subdivision plans totaling about 1,190 acres (Table 44). Columbia had the most lots with 59, or 47 percent of the total. The I-95 Corridor had 23 percent of the total with 29 recorded lots. The West had 21 recorded lots last year, followed by Ellicott City with 16 lots. Of the 57 subdivision plans recorded last year, 39 percent were in Columbia, followed by 30 percent in the I-95 Corridor, 18 percent in the West and 14 percent in Ellicott City.

Of the total 1,190 acres of non-residential land recorded, 653 acres, or 55 percent, were in Columbia. A total of 323 acres were recorded in the I-95 Corridor (27 percent). In the West there were 143 recorded acres last year representing 12 percent of the total. The least amount of non-residential acreage was recorded in Ellicott City with 71 acres, 6 percent of the total.

Table 45 shows the number of recorded lots by development type. Of the 125 lots recorded last year, 50 were for industrial uses, 39 for commercial uses (which includes retail and office space), and 4 were for institutional uses. There were also 32 other lots recorded for open space, easements or paved surfaces. Most of the new commercial lots were in Columbia and Ellicott City. Most of the industrial lots were in Columbia and the I-95 Corridor. There was one institutional parcel recorded in each of the four areas including a post office in Ellicott City and a church in each of the other three areas.



**Table 44**  
**Recorded Non-Residential Subdivisions, 10/01/99 to 9/30/00**

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	59	47%	22	39%	653	55%
Ellicott City	16	13%	8	14%	71	6%
I-95 Corridor	29	23%	17	30%	323	27%
West	21	17%	10	18%	143	12%
<b>TOTAL</b>	<b>125</b>	<b>100%</b>	<b>57</b>	<b>100%</b>	<b>1,190</b>	<b>100%</b>

**Table 45**  
**Recorded Lots by Development Type, 10/01/99 to 9/30/00**

Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL
Columbia	17	21	1	20	<b>59</b>
Ellicott City	15	0	1	0	<b>16</b>
I-95 Corridor	2	22	1	4	<b>29</b>
West	5	7	1	8	<b>21</b>
<b>TOTAL</b>	<b>39</b>	<b>50</b>	<b>4</b>	<b>32</b>	<b>125</b>
<b>PERCENT</b>	<b>31%</b>	<b>40%</b>	<b>3%</b>	<b>26%</b>	<b>100%</b>

1. Includes easements, open space and paved areas (parking lot).

## Last Year's Projects - Greater than 50 Acres

Of the total 1,190 non-residential acres recorded last year, almost 600 acres, about 50 percent of the total, were in subdivisions with greater than 50 acres. These larger subdivisions are shown in Table 46. The location of these plans are shown on Map 14.

In Columbia, three subdivisions with more than 50 acres were recorded last year. These plans are all located in Columbia Gateway and total almost 400 acres. In the West, there was one 53 acre plan recorded in the Montpelier Research Park. Along the I-95 Corridor three larger subdivisions were recorded totaling almost 156 acres.

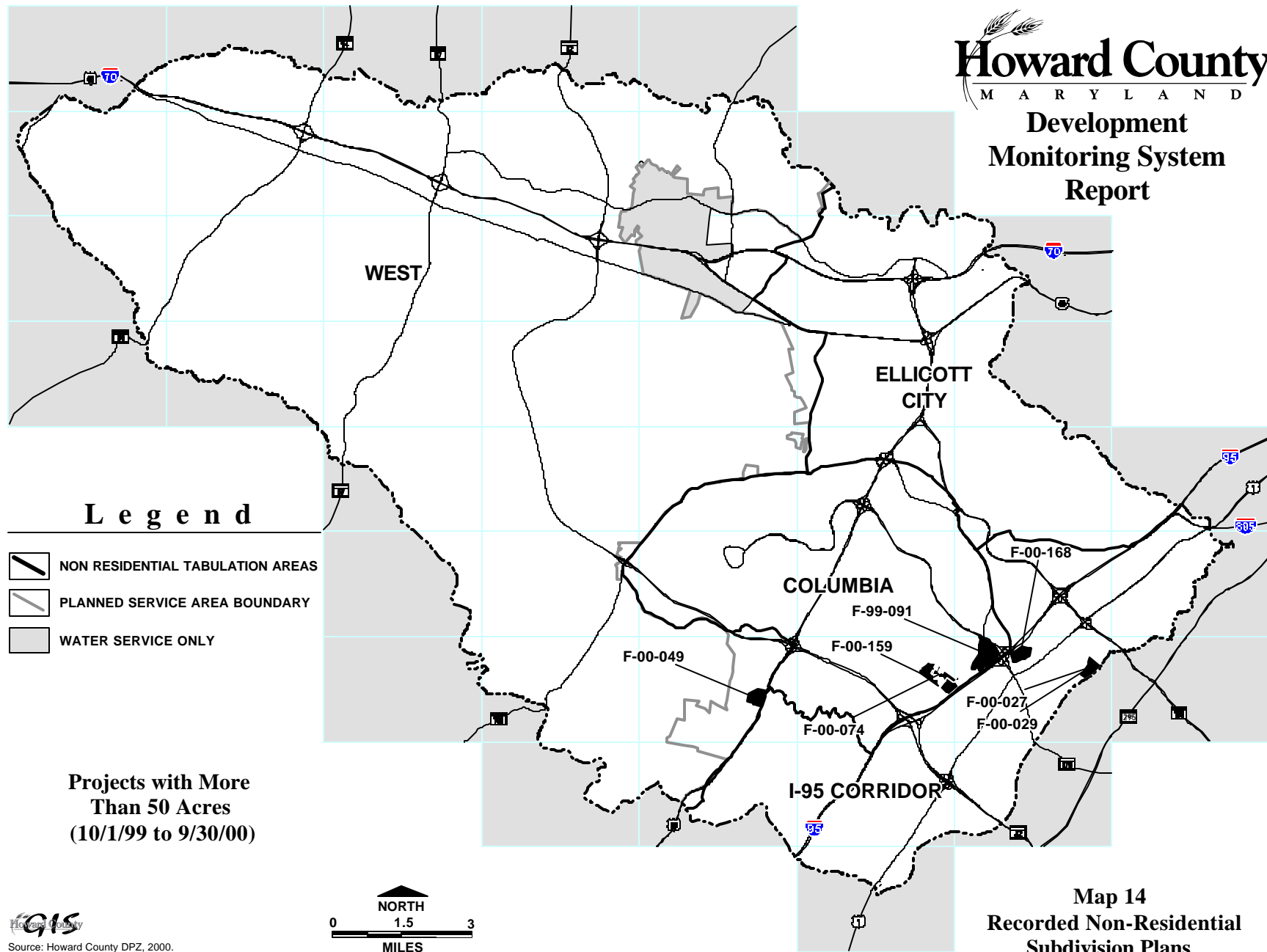
## Five Year Results

Table 47 shows the recorded non-residential subdivisions for the last five years from October 1, 1995 to September 30, 2000. Over this five year period there were 518 non-residential lots recorded countywide in 210 subdivision plans totaling about 5,070 acres. This equates to a five year average of 1,014 recorded acres per year. Over the five year period, 60 percent of the acreage was in Columbia, 21 percent in the I-95 Corridor, 11 percent in Ellicott City, and 9 percent in the West.

Table 48 shows the total non-residential acreage recorded by year for each of the last five years. It is apparent that for the last two years there has been an increase in the amount of recorded non-residential land with 1,235 and

**Table 46**  
**Recorded Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 10/01/99 to 9/30/00**

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-00-159	Columbia Gateway	Industrial	135.2	<b>388.6</b>
	F-99-091	Columbia Gateway	Industrial	133.4	
	F-00-074	Columbia Gateway	Industrial	120.0	
West	F-00-049	Montpelier Research Park	Industrial	52.9	<b>52.9</b>
I-95 Corridor	F-00-027	Howard Business Park	Industrial	51.9	<b>155.7</b>
	F-00-029	Howard Business Park	Industrial	51.9	
	F-00-168	New Colony	Forest Con./Flood Plain/Utility Easement	51.9	
<b>TOTAL</b>					<b>597.2</b>



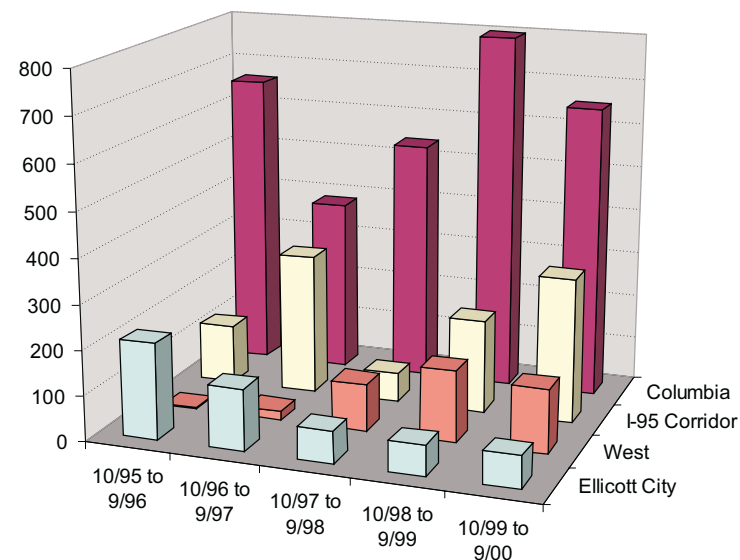
**Table 47**  
**Recorded Non-Residential Subdivisions, 10/01/95 to 9/30/00**

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	268	52%	97	46%	3,039	60%
Ellicott City	90	17%	43	20%	559	11%
I-95 Corridor	100	19%	45	21%	1,041	21%
West	60	12%	25	12%	431	9%
<b>TOTAL</b>	<b>518</b>	<b>100%</b>	<b>210</b>	<b>100%</b>	<b>5,070</b>	<b>100%</b>

1,190 recorded acres compared to only 780, 856, and 1,009 recorded acres during the previous three years, respectively. Chart 20 shows these results graphically by region. It is apparent that Columbia has had the most activity over the five year period with more than 60 percent of the total countywide acreage recorded there. It should be noted that the recorded acreage includes resubdivisions and does not reflect net new recorded non-residential acreage.

Table 49 summarizes the number of lots by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, commercial lots comprised 43 percent of the total 518 recorded lots. This is followed by industrial lots at 30 percent of the total and other lots at 22 percent of the total. (Other lots include easements, recreation parcels, open space, a golf course, cemeteries, non-buildable parcels, stormwater man-

**Chart 20**  
**Recorded Non-Residential Acres**



agement areas, and roadways.) Institutional lots consisted of the remaining 4 percent of the five year total.

**Table 48**  
**Recorded Non-Residential Acreage, 10/01/95 to 9/30/00**

Region	10/95-9/96	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	TOTAL	PERCENT
Columbia	662	385	540	799	653	3,039	60%
Ellicott City	214	137	70	67	71	559	11%
I-95 Corridor	130	314	65	209	323	1,041	21%
West	3	20	106	159	143	431	9%
<b>TOTAL</b>	<b>1,009</b>	<b>856</b>	<b>780</b>	<b>1,235</b>	<b>1,190</b>	<b>5,070</b>	<b>100%</b>

**Table 49**  
**Number of Non-Residential Recorded Lots by Development Type, 10/01/95 to 9/30/00**

10/95 to 9/96						10/96 to 9/97					
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	
Columbia	16	8	0	8	32	47	17	6	11	81	
Ellicott City	13	0	2	6	21	22	0	0	1	23	
I-95 Corridor	10	6	0	4	20	8	12	0	3	23	
West	0	0	0	1	1	0	0	0	1	1	
<b>TOTAL</b>	<b>39</b>	<b>14</b>	<b>2</b>	<b>19</b>	<b>74</b>	<b>77</b>	<b>29</b>	<b>6</b>	<b>16</b>	<b>128</b>	
<b>PERCENT</b>	<b>53%</b>	<b>19%</b>	<b>3%</b>	<b>26%</b>	<b>100%</b>	<b>60%</b>	<b>23%</b>	<b>5%</b>	<b>13%</b>	<b>100%</b>	

10/97 to 9/98						10/98 to 9/99					
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	
Columbia	22	15	4	4	45	9	17	2	23	51	
Ellicott City	7	0	4	2	13	10	2	0	5	17	
I-95 Corridor	7	4	0	1	12	2	11	0	3	16	
West	0	5	0	3	8	13	8	0	8	29	
<b>TOTAL</b>	<b>36</b>	<b>24</b>	<b>8</b>	<b>10</b>	<b>78</b>	<b>34</b>	<b>38</b>	<b>2</b>	<b>39</b>	<b>113</b>	
<b>PERCENT</b>	<b>46%</b>	<b>31%</b>	<b>10%</b>	<b>13%</b>	<b>100%</b>	<b>30%</b>	<b>34%</b>	<b>2%</b>	<b>35%</b>	<b>100%</b>	

10/99 to 9/00						TOTAL 10/95 to 9/00					
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	
Columbia	17	21	1	20	59	111	78	13	66	268	
Ellicott City	15	0	1	0	16	67	2	7	14	90	
I-95 Corridor	2	22	1	4	29	29	55	1	15	100	
West	5	7	1	8	21	18	20	1	21	60	
<b>TOTAL</b>	<b>39</b>	<b>50</b>	<b>4</b>	<b>32</b>	<b>125</b>	<b>225</b>	<b>155</b>	<b>22</b>	<b>116</b>	<b>518</b>	
<b>PERCENT</b>	<b>31%</b>	<b>40%</b>	<b>3%</b>	<b>26%</b>	<b>100%</b>	<b>43%</b>	<b>30%</b>	<b>4%</b>	<b>22%</b>	<b>100%</b>	

1. Includes access easements, recreation parcels/open space/golf course, cemeteries, non-buildable parcels, storm-water management, and roadway.

# In-Process Non-Residential Subdivisions

This section summarizes non-residential subdivisions in process. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential lots and acreage currently being processed as of September 30, 2000 are tabulated and compared with those in process a year earlier (as of September 30, 1999).

## Number of Plans

Countywide, there were 29 non-residential plans in process as of September 30, 2000, 10 less than the 39 in process one year earlier (Table 50). This trend is also reflected at the regional level, where all regions have less plans in process this year compared to last. For both years most of the plans

were in the Final Plan stage. This is primarily due to the relatively high number of resubdivisions which only come in at the Final Plan stage.

As of September 30, 2000, the I-95 Corridor had the most plans in process with 16. This is followed by 8 plans in process in Columbia, 4 plans in the West, and 1 plan in Ellicott City.

## Number of Lots

Table 51 shows the number of potential non-residential lots in process. Similar to the number of plans, there were less lots in process on September 30, 2000 compared to one year earlier, 64 versus 84, respectively.

**Table 50**  
**Number of Non-Residential Subdivision Plans in Process, 09/30/00 and 09/30/99**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Columbia	0	0	1	2	0	0	9	6	10	8
Ellicott City	0	0	0	0	0	0	5	1	5	1
I-95 Corridor	1	0	1	1	1	1	15	14	18	16
West	1	2	0	0	0	1	5	1	6	4
<b>TOTAL</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>34</b>	<b>22</b>	<b>39</b>	<b>29</b>

**Table 51**  
**Number of Potential Non-Residential Lots from Subdivision Plans in Process, 09/30/00 and 09/30/99**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL LOTS	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Columbia	0	0	2	10	0	0	21	12	23	22
Ellicott City	0	0	0	0	0	0	13	1	13	1
I-95 Corridor	4	0	2	2	0	4	30	30	36	36
West	2	2	0	0	0	1	10	2	12	5
<b>TOTAL</b>	<b>6</b>	<b>2</b>	<b>4</b>	<b>12</b>	<b>0</b>	<b>5</b>	<b>74</b>	<b>45</b>	<b>84</b>	<b>64</b>

Most of the non-residential lots in process for both years were in the I-95 Corridor. Columbia had the second highest number of lots, followed by the West and then Ellicott City.

Table 54 shows a more detailed breakdown of the number of non-residential lots in process by development type for this most recent year and for one year earlier. For both years, the greatest number lots in process were for industrial uses – 29 lots as of September 30, 2000 compared to 36 lots one year earlier. This is followed by commercial lots where there were 18 and 23 lots in process for the same years, respectively. There were 16 and 22 other lots for the 2000 and 1999 years. (Other lots consist of access easements, open space, stormwater management, and roadway uses.) There were only 1 and 3 institutional lots in process in 2000 and 1999.

## Number of Acres

There were a total of 755 non-residential acres in the subdivision process as

of September 30, 2000 (Table 52). This compares to 918 acres in process one year earlier. For the current year most of the acreage is in the I-95 Corridor (440 acres). This is followed by Columbia with 227 acres, the West with 87 acres, and Ellicott City with only 1 acre.

## Major Projects

Of the 755 acres of non-residential land in process, 430 acres (57 percent) are for projects greater than 50 acres (Table 53). About 270 of these acres are in the I-95 Corridor as part of the Patapsco Valley Business Center and the Clue Stream Corporate Center. The remaining 160 acres are for larger projects in Columbia including the 102 acre Snowden River Business Park and 58 acres in Columbia Gateway. Map 15 shows the locations of these projects.

**Table 52**  
**Acreage of Non-Residential Subdivision Plans in Process, 09/30/00 and 09/30/99**

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Columbia	0	0	16	118	0	0	247	110	263	227
Ellicott City	0	0	0	0	0	0	57	1	57	1
I-95 Corridor	78	0	8	8	0	76	380	356	465	440
West	83	66	0	0	0	17	50	4	133	87
<b>TOTAL</b>	<b>161</b>	<b>66</b>	<b>23</b>	<b>125</b>	<b>0</b>	<b>93</b>	<b>734</b>	<b>470</b>	<b>918</b>	<b>755</b>

**Table 53**  
**In-Process Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 09/30/00**

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	SP-00-005	Snowden River Business Park	Commercial	102.0	<b>160.4</b>
	F-00-132	Columbia Gateway	Industrial-Parcels	58.4	
I-95 Corridor	F-94-024	Patapsco Valley Business Center	Industrial	193.8	<b>270.1</b>
	P-00-020	Blue Stream Corporate Center	Industrial-Parcels	76.4	
<b>TOTAL</b>					<b>430.5</b>

Table 54

Number of Potential Lots From Non-Residential Subdivision Plans in Process by Development Type, 09/30/00 and 09/30/99

09/30/00 ==> Sketch						Preliminary Equivalent Sketch				
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL
Columbia	0	0	0	0	0	5	0	0	5	10
Ellicott City	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	0	0	0	0	0	2	0	0	0	2
West	2	0	0	0	2	0	0	0	0	0
<b>TOTAL</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>12</b>

09/30/00 ==> Preliminary						Final					TOTAL - 09/30/00				
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL
Columbia	0	0	0	0	0	5	3	0	4	12	10	3	0	9	22
Ellicott City	0	0	0	0	0	0	0	0	1	1	0	0	0	1	1
I-95 Corridor	0	4	0	0	4	1	22	1	6	30	3	26	1	6	36
West	1	0	0	0	1	2	0	0	0	2	5	0	0	0	5
<b>TOTAL</b>	<b>1</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>8</b>	<b>25</b>	<b>1</b>	<b>11</b>	<b>45</b>	<b>18</b>	<b>29</b>	<b>1</b>	<b>16</b>	<b>64</b>

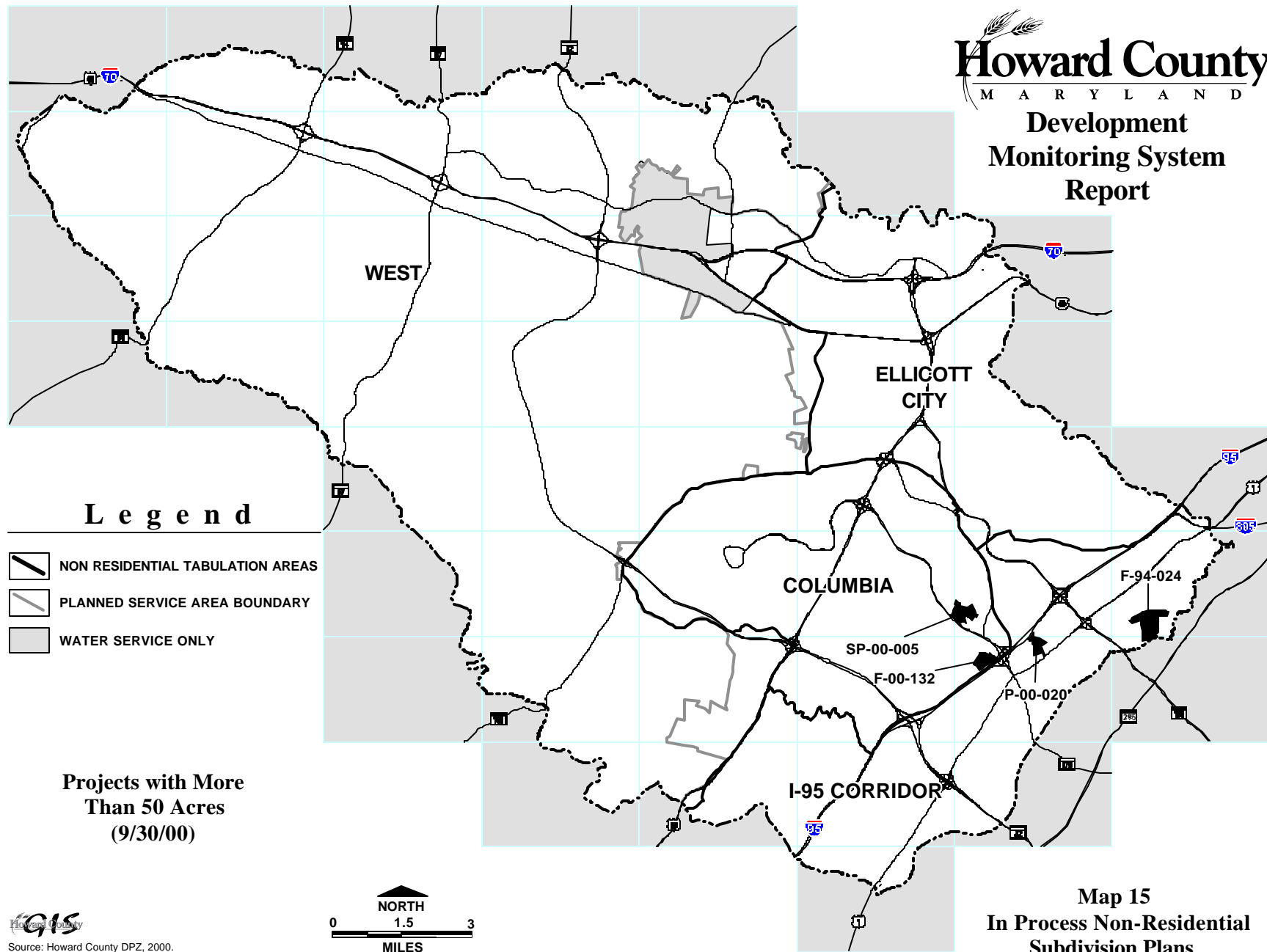
  

09/30/99 ==> Sketch						Preliminary Equivalent Sketch				
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL
Columbia	0	0	0	0	0	1	0	0	1	2
Ellicott City	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	0	4	0	0	4	2	0	0	0	2
West	2	0	0	0	2	0	0	0	0	0
<b>TOTAL</b>	<b>2</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>6</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>4</b>

09/30/99 ==> Preliminary						Final					TOTAL - 09/30/99				
Region	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL	Com.	Ind.	Inst.	Other <sup>1</sup>	TOTAL
Columbia	0	0	0	0	0	1	6	3	11	21	2	6	3	12	23
Ellicott City	0	0	0	0	0	13	0	0	0	13	13	0	0	0	13
I-95 Corridor	0	0	0	0	0	1	23	0	6	30	3	27	0	6	36
West	0	0	0	0	0	3	3	0	4	10	5	3	0	4	12
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>18</b>	<b>32</b>	<b>3</b>	<b>21</b>	<b>74</b>	<b>23</b>	<b>36</b>	<b>3</b>	<b>22</b>	<b>84</b>

1. Includes access easements, open space, stormwater management, and roadway.





## Approved Non-Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by four regions. The number of non-residential site development *plans* approved, the number of *lots* approved, and the *acreage* of approved plans have been compiled for each of these regions and are discussed below.

Additionally, the square footage of floor space in approved site development plans is compiled. This is useful to estimate employment, which is discussed later in this report (page 84). The analysis includes last year's site development plan activity as well as activity for the last five years.

### Summary of Last Year's Results

Last year there were 100 non-residential lots approved countywide in 77 site development plans totaling about 758 acres (Table 55). Columbia had the most activity with 42 lots approved, 42 percent of the total. The I-95 Corridor had 27 percent of the total with 27 approved lots. Ellicott City had 20 approved lots last year, followed by the West with 11 approved lots. Of the 77 site development plans approved last year, 27 were in Columbia, followed by 23 in the I-95 Corridor, 16 in Ellicott City and 11 in the West.

Of the total 758 acres of non-residential land approved in site development plans, 300 acres, or 40 percent, were in Columbia. A total of 239 acres

were approved in the I-95 Corridor (31 percent). In the West there were 121 approved acres last year representing 16 percent of the total. The least amount of non-residential acreage was recorded in Ellicott City with 99 acres representing 13 percent of the total.

Table 56 shows the number of approved lots by development type. Of the 100 lots recorded last year, 25 are for office/service uses, 15 are for retail uses, 14 are for manufacturing/extensive industrial uses and 14 are for government & institutional uses. There were also 32 other lots approved for open space, paved surfaces and other uses. Most of the new lots are in Columbia, followed by the I-95 Corridor, Ellicott City and the West.

**Table 56**  
**Number of Lots in Approved Site Development Plans, 10/01/99 to 9/30/00**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	6	11	0	5	20	42
Ellicott City	4	6	0	5	5	20
I-95 Corridor	3	4	14	0	6	27
West	2	4	0	4	1	11
<b>TOTAL</b>	<b>15</b>	<b>25</b>	<b>14</b>	<b>14</b>	<b>32</b>	<b>100</b>

1. Includes open space, paved surfaces, pumping station, mausoleum expansion.

**Table 55**  
**Approved Non-Residential Site Development Plans, 10/01/99 to 9/30/00**

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	42	42%	27	35%	300	40%
Ellicott City	20	20%	16	21%	99	13%
I-95 Corridor	27	27%	23	30%	239	31%
West	11	11%	11	14%	121	16%
<b>TOTAL</b>	<b>100</b>	<b>100%</b>	<b>77</b>	<b>100%</b>	<b>758</b>	<b>100%</b>

Table 57 shows the square footage of building space in last year's approved site development plans by type of use. Countywide, there was about 3.3 million square feet of building space approved. Just over 40 percent of this total, 1.36 million square feet, was in the I-95 Corridor. About 1.15 million square feet was in Columbia (35 percent). Ellicott City had about 407,400 square feet approved (12 percent), followed by the West with about 383,200 square feet (12 percent).

Slightly more than 50 percent of the total building space is for office/ser-

vice uses totaling 1.71 million square feet. This is followed by manufacturing/extensive industrial space with almost 1 million square feet of approved building space (30 percent). About 320,000 square feet are for government and institutional uses (10 percent), and about 260,000 square feet are for retail use (8 percent). The remaining 12,000 square feet are for other uses that do not generate additional employment.

<b>Table 57</b> <b>Building Square Feet in Approved Site Development Plans, 10/01/99 to 9/30/00</b>						
<b>Region</b>	<b>Retail</b>	<b>Office/ Service</b>	<b>Manuf./ Ext. Ind.</b>	<b>Govt. &amp; Inst.</b>	<b>Other<sup>1</sup></b>	<b>TOTAL</b>
Columbia	117,171	931,874	56,145	42,465	0	1,147,655
Ellicott City	26,287	259,259	0	121,705	139	407,390
I-95 Corridor	115,166	412,006	829,402	0	6,951	1,363,525
West	1,722	107,216	113,932	155,502	4,800	383,172
<b>TOTAL</b>	<b>260,346</b>	<b>1,710,355</b>	<b>999,479</b>	<b>319,672</b>	<b>11,890</b>	<b>3,301,742</b>
<b>PERCENT</b>	<b>7.9%</b>	<b>51.8%</b>	<b>30.3%</b>	<b>9.7%</b>	<b>0.4%</b>	<b>100.0%</b>
1. Includes pumping station, mausoleum expansion and non-employee generating storage space.						

## Last Year's Projects - Greater than 100,000 Square Feet

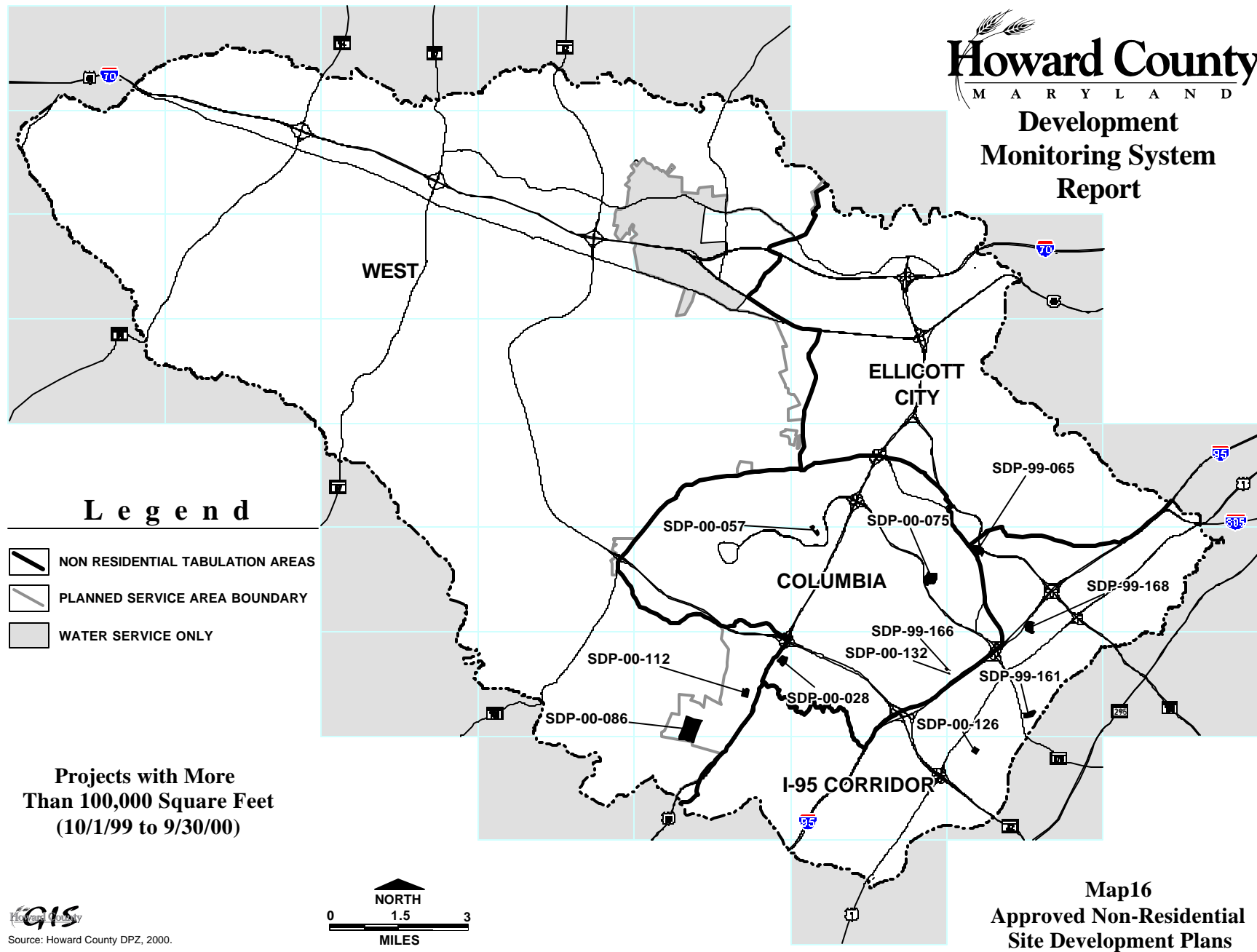
Of the total 3.3 million square feet of non-residential building space approved in site development plans last year, slightly more than 2 million square feet, about 60 percent of the total, were in plans with more than 100,000 square feet. These larger plans are shown in Table 58. The location of these plans are shown on Map 16.

In Columbia, five plans with more 100,000 square feet of building space were approved last year. These plans, located in various parts of Columbia as described in Table 58, total almost 810,000 square feet. In the West, there were two large plans approved, one of which was the new high school in Fulton. Along the I-95 Corridor, four larger plans were approved totaling almost 935,000 square feet.

## Five Year Results

Table 59 shows the approved non-residential site development plans for the last five years from October 1, 1995 to September 30, 2000. Over this five year period there were 472 non-residential lots approved countywide in 364 plans totaling 4,944 acres. This equates to a five year average of 989

<b>Table 58</b> <b>Projects With More Than 100,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/99 to 9/30/00</b>					
<b>Region</b>	<b>File Number</b>	<b>Plan Name</b>	<b>Use</b>	<b>Building Area</b>	<b>TOTAL</b>
Columbia	SDP-00-075	Columbia Route 175 Commercial	Office/Service-Offices	261,950	<b>809,471</b>
	SDP-99-166	Columbia Gateway	Office/Service-Res & Dev/Whse	150,380	
	SDP-00-028	Rivers Corporate Park	Office/Service-Research & Dev.	138,054	
	SDP-00-057	Town Center - The Mall In Columbia	Retail-Office/Service	136,200	
	SDP-00-132	Gateway Commerce Center	Office/Service-Office/Whse	122,887	
West	SDP-00-112	Montpelier Research Park	Office/Service-Whse/Office	156,982	<b>285,734</b>
	SDP-00-086	High School At Fulton Site	Govt & Inst-High School	128,752	
I-95 Corridor	SDP-99-065	The Horse Farm	Office/Service-Offices/Retail	365,724	<b>934,721</b>
	SDP-99-168	Meadowridge Business Park	Manu/Ind-Warehouse/Office	303,200	
	SDP-99-161	Jessup Park	Manu/Ind-Warehouse	158,400	
	SDP-00-126	Iron Mountain Storage Facility	Manu/Ind-Storage	107,397	
<b>TOTAL</b>					<b>2,029,926</b>



**Table 59**  
**Approved Non-Residential Site Development Plans, 10/01/95 to 9/30/00**

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	213	45%	133	37%	1,459	30%
Ellicott City	79	17%	64	18%	571	12%
I-95 Corridor	117	25%	105	29%	1,128	23%
West	63	13%	62	17%	1,786	36%
<b>TOTAL</b>	<b>472</b>	<b>100%</b>	<b>364</b>	<b>100%</b>	<b>4,944</b>	<b>100%</b>

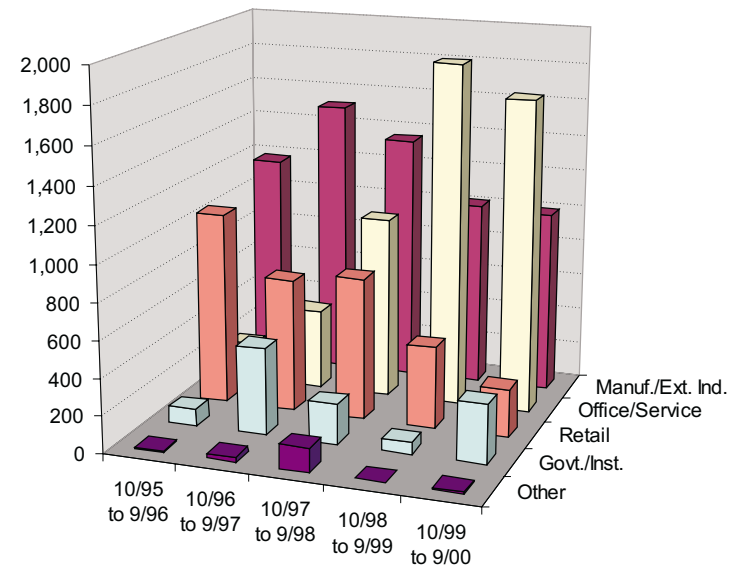
approved acres per year. Over the five year period, 36 percent of the acreage was in the West, 30 percent in Columbia, 23 percent in the I-95 Corridor and 12 percent in Ellicott City.

Table 60 shows the total non-residential acreage approved by year for each of the last five years. About the same amount of acreage has been approved for each the last two years, 758 and 772 acres, respectively. This is an increase over the 97/98 year, where only 551 acres were approved, but a decrease compared to 95/96 and 96/97 years where 1,856 and 1,006 acres were approved, respectively.

Table 61 summarizes the approved square footage by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, about 15.9 million square feet of non-residential space has been approved in the County. This is an average of about 3.2 million square feet per year.

Of this total, about 38 percent or 6.1 million square feet are for manufacturing/extensive industrial development (which includes warehouse space). About 33 percent or 5.2 million square feet are for office/service space. Retail space accounts for about 21 percent of the total with about 3.3 million square feet approved. Government and institutional uses account for

**Chart 21**  
**Approved Non-Residential Square Feet (X 1,000)**



**Table 60**  
**Acreage in Approved Non-Residential Site Development Plans, 10/01/95 to 9/30/00**

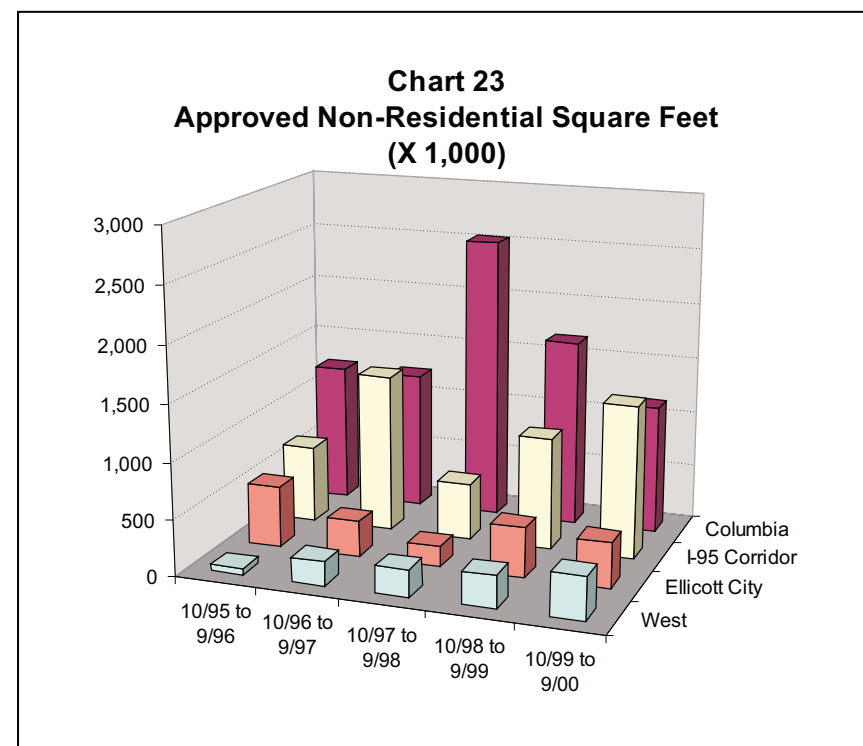
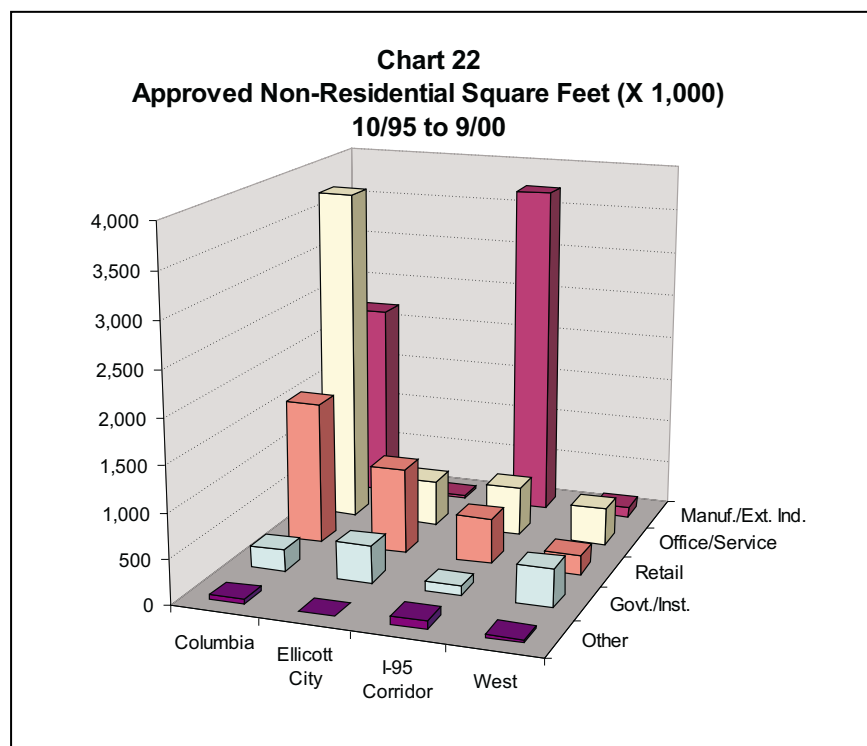
Region	10/95-9/96	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	TOTAL	PERCENT
Columbia	252	417	331	160	300	1,459	30%
Ellicott City	186	202	16	68	99	571	12%
I-95 Corridor	354	195	82	259	239	1,128	23%
West	1,064	192	123	286	121	1,786	36%
<b>TOTAL</b>	<b>1,856</b>	<b>1,006</b>	<b>551</b>	<b>772</b>	<b>758</b>	<b>4,944</b>	<b>100%</b>

about 7 percent of the approved building space (about 1.2 million square feet). The remaining 1 percent (176,000 square feet) are for other uses.

Chart 21 graphically shows the countywide square footage approved by development type for each of the five years. It is clear that in recent years the amount of approved office/service space has increased while the amount of approved manufacturing/extensive industrial space has decreased. In particular, there has been a marked increase in approved office/service space over the last two years. The amount of retail space approval has generally slowed each year over the five year period.

Chart 22 shows the five year approved square footage total by development type by region. It is clear that the I-95 Corridor has had the most manufacturing/extensive industrial square footage approved and Columbia has had the next greatest. Columbia has had the most office/service and retail square footage approved over the five year period.

Chart 23 shows the total non-residential square footage approved over time for each region. Overall and for most years, Columbia has had the most space approved, followed by the I-95 Corridor, Ellicott City and then the West. Table 61 reflects these results numerically.



**Table 61**  
**Building Square Feet in Approved Non-Residential Site Development Plans, 10/01/95 to 9/30/00**

10/95-9/96						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	384,420	176,476	605,650	73,141	0	1,239,687
Ellicott City	541,071	2,434	0	0	0	543,505
I-95 Corridor	117,677	0	570,320	0	109	688,106
West	12,310	25,204	0	17,064	5,000	59,578
TOTAL	1,055,478	204,114	1,175,970	90,205	5,109	2,530,876
PERCENT	41.7%	8.1%	46.5%	3.6%	0.2%	100.0%

10/96-9/97						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	495,979	324,496	336,596	56,061	19,636	1,232,768
Ellicott City	114,407	75,464	0	126,651	0	316,522
I-95 Corridor	111,638	28,230	1,177,286	95,738	0	1,412,892
West	5,349	11,333	0	195,284	5,290	217,256
TOTAL	727,373	439,523	1,513,882	473,734	24,926	3,179,438
PERCENT	22.9%	13.8%	47.6%	14.9%	0.8%	100.0%

10/97-9/98						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	593,619	728,614	1,133,258	54,172	28,348	2,538,011
Ellicott City	24,570	0	0	163,811	0	188,381
I-95 Corridor	147,173	51,247	218,842	0	86,107	503,369
West	9,300	216,328	0	0	15,260	240,888
TOTAL	774,662	996,189	1,352,100	217,983	129,715	3,470,649
PERCENT	22.3%	28.7%	39.0%	6.3%	3.7%	100.0%

10/98-9/99						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	4,000	1,593,835	58,125	20,157	0	1,676,117
Ellicott City	242,826	169,625	24,250	0	4,663	441,364
I-95 Corridor	12,000	54,309	934,540	0	0	1,000,849
West	187,026	56,411	0	45,488	0	288,925
TOTAL	445,852	1,874,180	1,016,915	65,645	4,663	3,407,255
PERCENT	13.1%	55.0%	29.8%	1.9%	0.1%	100.0%

10/99-9/00						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	117,171	931,874	56,145	42,465	0	1,147,655
Ellicott City	26,287	259,259	0	121,705	139	407,390
I-95 Corridor	115,166	412,006	829,402	0	6,951	1,363,525
West	1,722	107,216	113,932	155,502	4,800	383,172
TOTAL	260,346	1,710,355	999,479	319,672	11,890	3,301,742
PERCENT	7.9%	51.8%	30.3%	9.7%	0.4%	100.0%

TOTAL 10/95-9/00						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	1,595,189	3,755,295	2,189,774	245,996	47,984	7,834,238
Ellicott City	949,161	506,782	24,250	412,167	4,802	1,897,162
I-95 Corridor	503,654	545,792	3,730,390	95,738	93,167	4,968,741
West	215,707	416,492	113,932	413,338	30,350	1,189,819
TOTAL	3,263,711	5,224,361	6,058,346	1,167,239	176,303	15,889,960
PERCENT	20.5%	32.9%	38.1%	7.3%	1.1%	100.0%

1. Includes communications tower, park facilities, storage building, guard house, pumping station, mausoleum expansion and non-employee generating storage space.

# In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of September 30, 2000 are tabulated and compared with those in process a year earlier (as of September 30, 1999).

## Number of Plans

Countywide, there were 71 non-residential site development plans in process as of September 30, 2000, 3 more than the 68 in process one year earlier (Table 62). All regions except Ellicott City had more plans in process this current year compared to last year. As of September 30, 2000, the

I-95 Corridor had the most plans in process with 22. This is followed by 21 plans in process in Columbia and 14 plans in process each in the West and Ellicott City.

## Number of Lots

Table 63 shows the number of potential non-residential lots in the site development plan process. Results are shown for each year and by development type. Similar to the number of plans, there were less lots in process on September 30, 2000 compared to one year earlier, 91 versus 73, respectively.

The greatest number of the non-residential lots in process for both years were in Columbia. The I-95 Corridor and Ellicott City had the next greatest activity for both years. The West had the least number of lots in process for both years.

As of September 30, 2000, there were 24 government and institutional lots in the site development plan process. This is followed by 19 office/service lots in process, 14 manufacturing/extensive industrial lots in process, 9 retail lots in process and 7 other lots in process.

**Table 62**  
**Number of Non-Residential SDP's In Process, 09/30/99 & 09/30/00**

Region	1999	2000
Columbia	18	21
Ellicott City	22	14
I-95 Corridor	20	22
West	8	14
<b>TOTAL</b>	<b>68</b>	<b>71</b>

**Table 63**  
**Number of Lots in In-Process Site Development Plans by Development Type, 09/30/99 & 09/30/00**

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other <sup>1</sup>		TOTAL	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Columbia	6	2	5	9	0	1	3	6	20	4	34	22
Ellicott City	5	5	7	4	0	0	12	7	3	0	27	16
I-95 Corridor	2	0	3	3	13	12	0	3	4	3	22	21
West	1	2	1	3	1	1	4	8	1	0	8	14
<b>TOTAL</b>	<b>14</b>	<b>9</b>	<b>16</b>	<b>19</b>	<b>14</b>	<b>14</b>	<b>19</b>	<b>24</b>	<b>28</b>	<b>7</b>	<b>91</b>	<b>73</b>

1. Includes forest mitigation, landfill improvements, mass grading, mausoleum expansion, open space, paved surfaces, pump station, and slope/sediment control



## Number of Acres

There were a total of 1,259 acres of non-residential land in the site development plan process as of September 30, 2000 (Table 64). This compares to a roughly similar amount of 1,227 acres in process the previous year. For the current year a significant majority of the acreage is in the I-95 Corridor (774 acres including 328 acres for the Chase quarry). This is followed by the West with 208 acres, Columbia with 190 acres and Ellicott City with 87 acres.

**Table 64**  
**Acreage of Non-Residential SDP's In Process, 09/30/99 & 09/30/00**

Region	1999	2000
Columbia	226	190
Ellicott City	241	87
I-95 Corridor	653	774
West	107	208
<b>TOTAL</b>	<b>1,227</b>	<b>1,259</b>

## Building Floor Space

Table 65 shows the square footage of non-residential building space by building type in the site development plan process. As of September 30, 2000 there was about 2.7 million square feet of building space in the site development plan process. This compares to 2.1 million square feet in process for the previous year, 600,000 square feet less.

For both years most of the building space was in the I-95 Corridor. This is followed by planned space in Columbia. Ellicott City and the West had the least amount of planned building space.

As of September 30, 2000, there was about 1.2 million square feet of manufacturing/extensive industrial building space in the site development plan process. This is followed by about 979,000 square feet of office/service space, 371,000 square feet of government and institutional space and 189,000 square feet of retail space in process. Chart 24 reflects these results graphically and by region.

## Major Projects

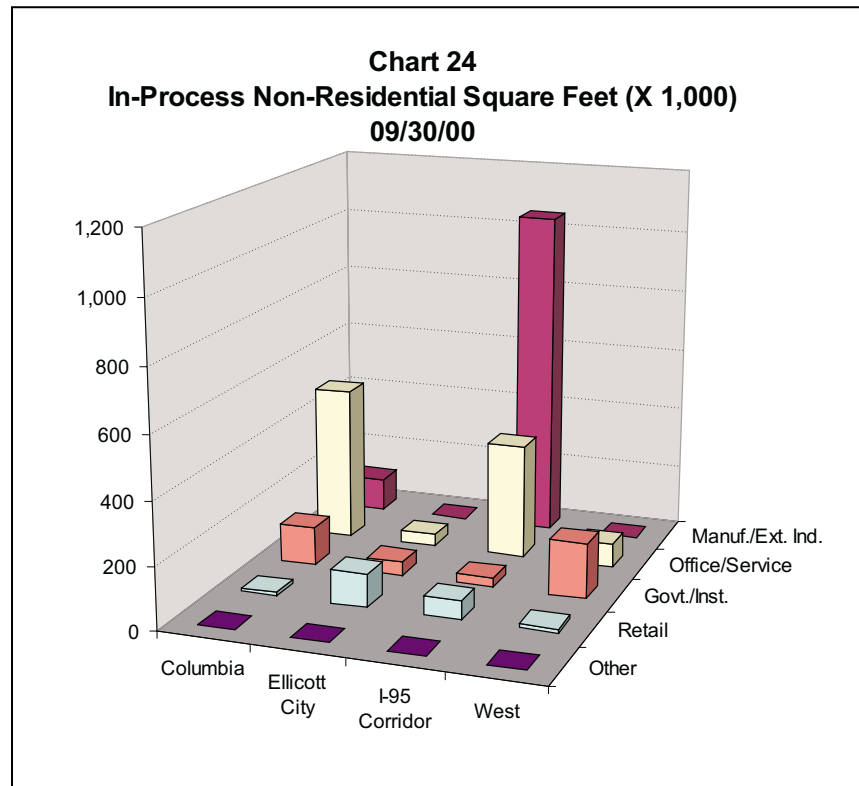
Of the total 2.7 million square feet of non-residential building space in the site development plans process as of September 30, 2000, about 1.5 million square feet, 56 percent of the total, were in plans with more than 100,000 square feet. These larger plans are shown in Table 65. The location of these plans are shown on Map 17.

In Columbia, two plans with more 100,000 square feet of building space were in process. These plans, both located in Columbia Gateway, total almost 363,000 square feet. In the I-95 Corridor, there were five large plans in process, totaling about 1.1 million square feet. These plans include development in Troy Hill, Lyndwood Square, Dorsey Run and Prologis Park in Troy Hill.

**Table 65**  
**Building Square Feet in In-Process Non-Residential Site Development Plans, 09/30/99 & 09/30/00**

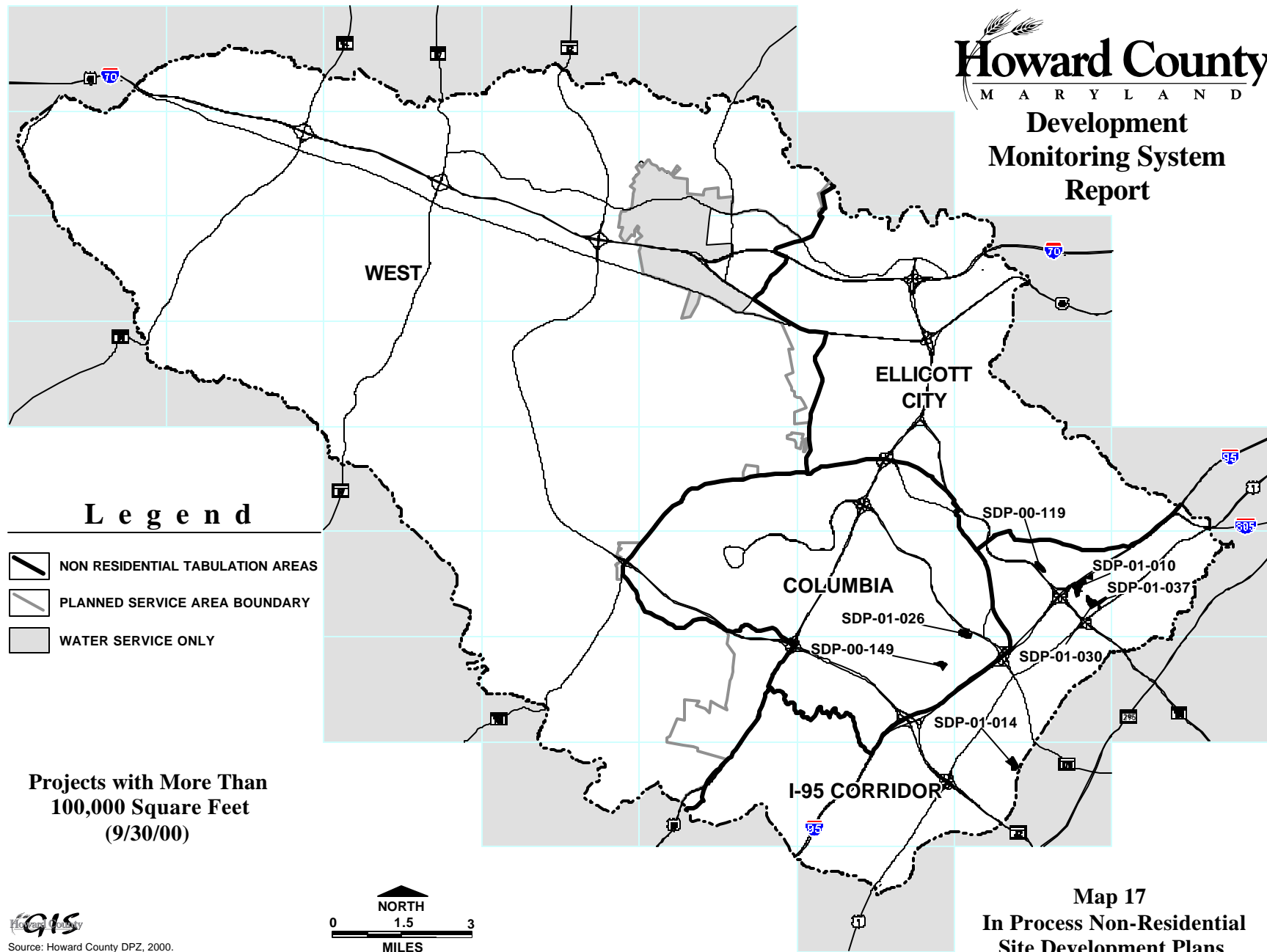
Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other		TOTAL	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Columbia	38,071	10,105	401,598	493,522	0	105,850	15,123	121,992	0	0	454,792	731,469
Ellicott City	47,700	107,159	239,941	38,690	0	0	117,764	44,435	139	0	405,544	190,284
I-95 Corridor	112,606	60,000	358,574	369,532	711,129	1,052,983	0	28,352	4,792	0	1,187,101	1,510,867
West	1,864	11,937	14,705	77,230	3,000	3,000	34,024	176,501	0	0	53,593	268,668
<b>TOTAL</b>	<b>200,241</b>	<b>189,201</b>	<b>1,014,818</b>	<b>978,974</b>	<b>714,129</b>	<b>1,161,833</b>	<b>166,911</b>	<b>371,280</b>	<b>4,931</b>	<b>0</b>	<b>2,101,030</b>	<b>2,701,288</b>





**Table 66**  
**Projects With More Than 100,000 Square Feet in In-Process Non-Residential Site Development Plans, 9/30/00**

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-01-026	Columbia Gateway	Office/Service-Offices/Bank	257,100	<b>362,950</b>
	SDP-00-149	Columbia Gateway	Manu/Ind-Office/Warehouse	105,850	
I-95 Corridor	SDP-01-010	Prologis Park	Manu/Ind-Warehouse/Office	481,583	<b>1,137,350</b>
	SDP-01-030	Troy Hill Corporate Center	Industrial-Parcels	184,004	
	SDP-00-119	Lyndwood Square	Office/Service-Offices	178,963	
	SDP-01-037	Troy Hill Corporate Center	Office/Service/Retail	150,000	
	SDP-01-014	Dorsey Run Industrial Park	Manu/Ind-Warehouse/Office	142,800	
<b>TOTAL</b>					<b>1,500,300</b>



## Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by region.

### Summary of Last Year's Results

Last year from October 1, 1999 to September 30, 2000, 181 non-residential building permits were issued for new construction (Table 67). Columbia had the greatest number of issued permits with 81, 45 percent of the total. The West had 35 issued permits (19 percent). Ellicott City and the I-95 Corridor had 32 and 33 issued permits, respectively, about 18 percent of

the total each.

Countywide, building permits were issued for slightly more than 3.1 million square feet of non-residential space last year. Almost half of this total, about 1.5 million, was for office/service space. About 860,000 square feet was for manufacturing/extensive industrial space, 580,000 square feet for retail space and 150,000 square feet for government and institutional space (Table 68).

By region, 1.4 million square feet, 45 percent of the total, are in Columbia. About 1 million square feet are in the I-95 Corridor and almost 490,000 square feet are in Ellicott City. The remaining 219,000 square feet are located in the West.

### Last Year's Permits - Greater Than 50,000 Square Feet

Table 69 shows the major projects of more than 50,000 square feet that were issued building permits last year. These projects amount to slightly more than 1.9 million square feet of space, about 61 percent of the 3.1 million square feet total. About 720,000 square feet of this space are in the I-95 Corridor, 700,000 square feet in Columbia, 430,000 square feet in Ellicott City and 53,000 square feet in the West.

**Table 67**  
**Issued Non-Residential Building Permits, 10/01/99 to 9/30/00**

Region	Number	Percent
Columbia	81	45%
Ellicott City	32	18%
I-95 Corridor	33	18%
West	35	19%
<b>TOTAL</b>	<b>181</b>	<b>100%</b>

**Table 68**  
**Square Feet of Issued Non-Residential Building Permits by Type, 10/01/99 to 9/30/00**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL	PERCENT
Columbia	189,341	1,099,040	82,805	28,579	7,276	<b>1,407,041</b>	<b>45%</b>
Ellicott City	207,918	164,672	0	116,731	613	<b>489,934</b>	<b>16%</b>
I-95 Corridor	56,090	183,021	779,952	4,340	1,280	<b>1,024,683</b>	<b>33%</b>
West	125,007	90,146	0	0	3,864	<b>219,017</b>	<b>7%</b>
<b>TOTAL</b>	<b>578,356</b>	<b>1,536,879</b>	<b>862,757</b>	<b>149,650</b>	<b>13,033</b>	<b>3,140,675</b>	<b>100%</b>

1. Includes minor non-employee generating add-on storage space, pumping station & communication tower.

**Table 69**  
**Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/99 to 9/30/00**

<b>Region</b>	<b>Subdivision</b>	<b>Proposed Use</b>	<b>Square Feet</b>	<b>TOTAL</b>
I-95 Corridor	Meadowridge Business Park	Distribution/Warehouse Building 4	220,800	<b>721,914</b>
	The Horse Farm	Office	119,027	
	Baltimore Washington Ind. Park	Warehouse/Storage Addition	107,397	
	Freestate Parcel C	Ohmeda Medical/Warehouse	87,540	
	Meadowridge Business Park	Warehouse - Building 3	65,920	
	Howard Business Park	Warehouse Storage of Baked Goods	63,700	
	Baltimore Washington Ind. Park	1-Story Warehouse-Building C	57,530	
Columbia	Columbia Corporate Park	Gramophone/Office & Showroom	89,322	<b>704,416</b>
	Columbia Gateway	4 Story Office Building	84,624	
	Town Center	New Restaurant - Copelands Of New Orleans	80,891	
	Town Center	Retail Building	78,700	
	Columbia Gateway	2-Story Office Building A	66,742	
	Columbia Gateway	2 Story Office-Building D	66,742	
	Rivers Corporate Park	2 Story Office Building	64,254	
	Town Center	Office/New 6 Story Multi-Tenant Building	59,496	
	Town Center	Office Building	57,500	
	Columbia Gateway	Office-1Story	56,145	
Ellicott City	Chatham Station	The Home Depot-New Store	134,634	<b>429,941</b>
	Ellicott Mills Middle School	New School	97,567	
	Columbia 100 Office Park	New 4 Story Office Building	85,798	
	Hoenes Property	Mercantile-Metro Foods	57,642	
	Columbia 100/Parcel	New Hotel	54,300	
West	GTW Waverly Woods	New Weis Markets Inc.	53,200	<b>53,200</b>
<b>TOTAL</b>				<b>1,909,471</b>

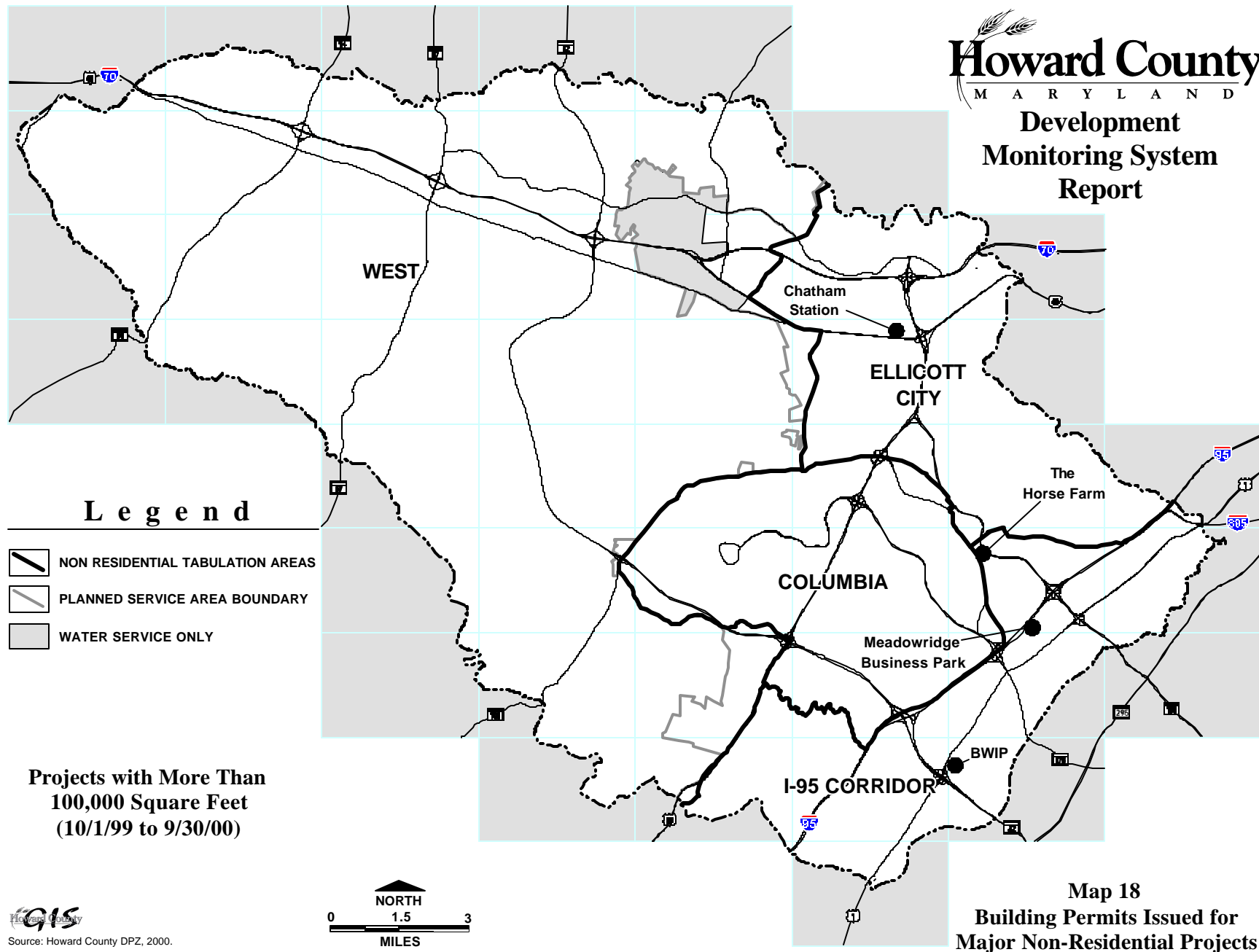
Permits of more than 100,000 square feet include projects in the Meadowridge Business Park, the former horse farm at MD 108/Snowden River Parkway, the Baltimore Washington Industrial Park and Chatham Station. Map 18 shows the location of these larger projects.

## Five Year Results

Over the last five years from October 1, 1995 to September 30, 2000, 946 non-residential building permits were issued for new construction (Table

70). This is an average of about 189 permits per year. Over the five year period Columbia had the greatest number of issued permits with 440, about 47 percent of the total. The I-95 Corridor had 226 issued permits (24 percent). Ellicott City and the West had 151 and 129 issued permits, about 16 percent and 14 percent of the total respectively.

Table 71 summarizes the square footage in issued building permits by development type for each of the last five years. The five year total is also



**Table 70**  
**Issued Non-Residential Building Permits, 10/01/95 to 9/30/00**

Region	10/95-9/96	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	TOTAL	PERCENT
Columbia	26	123	133	77	81	440	47%
Ellicott City	17	41	32	29	32	151	16%
I-95 Corridor	24	61	60	48	33	226	24%
West	11	17	25	41	35	129	14%
<b>TOTAL</b>	<b>78</b>	<b>242</b>	<b>250</b>	<b>195</b>	<b>181</b>	<b>946</b>	<b>100%</b>

shown in the bottom right hand corner of the table. For the five year period, building permits for about 14.4 million square feet of non-residential space have been issued in the County. This is an average of about 2.9 million square feet per year.

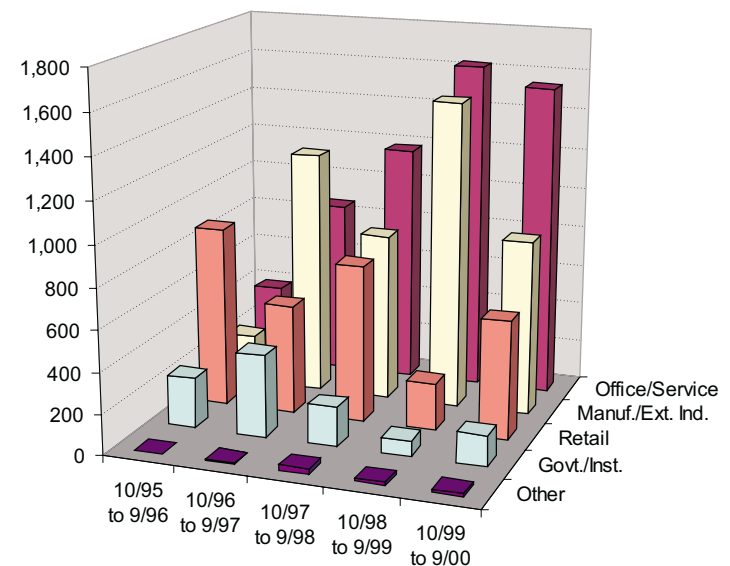
Of this total, almost 39 percent or 5.6 million square feet are for office/service space. About 32 percent or 4.6 million square feet are for manufacturing/extensive industrial space. Retail space accounts for about 21 percent of the total with about 3 million square feet. Government and institutional uses account for 7.4 percent of the total (almost 1.1 million square feet). The remaining 0.4 percent (64,000 square feet) are for other uses.

Chart 25 graphically shows the countywide square footage by development type for each of the five years. It is clear that the amount of office/service space has grown significantly since 1995. There has also been large amounts of manufacturing/extensive industrial square footage in issued building permits over the five year period. This is followed by retail space, government and institutional space and other uses, respectively.

Chart 26 shows the five year square footage total by development type by region. It is apparent that most of the development over the last five years is for manufacturing/extensive industrial and office/service uses. Furthermore, it is clear that most of the manufacturing/extensive industrial development is in the I-95 Corridor and most of the office/service development is in the Columbia region. Columbia also has the most retail development, followed by Ellicott City.

Chart 27 shows the total non-residential square footage in issued building permits over time for each region. For most years, Columbia and the I-95 Corridor had the most development, followed by Ellicott City and the West.

**Chart 25**  
**Non-Residential Square Feet - Building Permits (X 1,000)**



**Table 71**  
**Square Feet of Issued Non-Residential Building Permits by Type, 10/01/95 to 9/30/00**

10/95 to 9/96						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	193,640	108,215	0	2,400	0	304,255
Ellicott City	523,453	219,730	0	67,052	0	810,235
I-95 Corridor	105,169	7,212	235,650	93,000	1,279	442,310
West	64,473	50,971	0	84,116	0	199,560
<b>TOTAL</b>	<b>886,735</b>	<b>386,128</b>	<b>235,650</b>	<b>246,568</b>	<b>1,279</b>	<b>1,756,360</b>
<b>PERCENT</b>	<b>50.5%</b>	<b>22.0%</b>	<b>13.4%</b>	<b>14.0%</b>	<b>0.1%</b>	<b>100.0%</b>

10/96 to 9/97						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	427,274	370,713	140,991	68,598	4,011	1,011,587
Ellicott City	37,007	90,704	0	175,269	1,020	304,000
I-95 Corridor	59,496	382,676	1,056,441	77,028	0	1,575,641
West	11,513	16,366	5,010	82,322	0	115,211
<b>TOTAL</b>	<b>535,290</b>	<b>860,459</b>	<b>1,202,442</b>	<b>403,217</b>	<b>5,031</b>	<b>3,006,439</b>
<b>PERCENT</b>	<b>17.8%</b>	<b>28.6%</b>	<b>40.0%</b>	<b>13.4%</b>	<b>0.2%</b>	<b>100.0%</b>

10/97 to 9/98						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	531,784	904,223	103,549	0	28,150	1,567,706
Ellicott City	116,002	0	0	94,511	0	210,513
I-95 Corridor	110,316	111,781	720,951	5,700	0	948,748
West	13,752	161,280	0	91,770	0	266,802
<b>TOTAL</b>	<b>771,854</b>	<b>1,177,284</b>	<b>824,500</b>	<b>191,981</b>	<b>28,150</b>	<b>2,993,769</b>
<b>PERCENT</b>	<b>25.8%</b>	<b>39.3%</b>	<b>27.5%</b>	<b>6.4%</b>	<b>0.9%</b>	<b>100.0%</b>

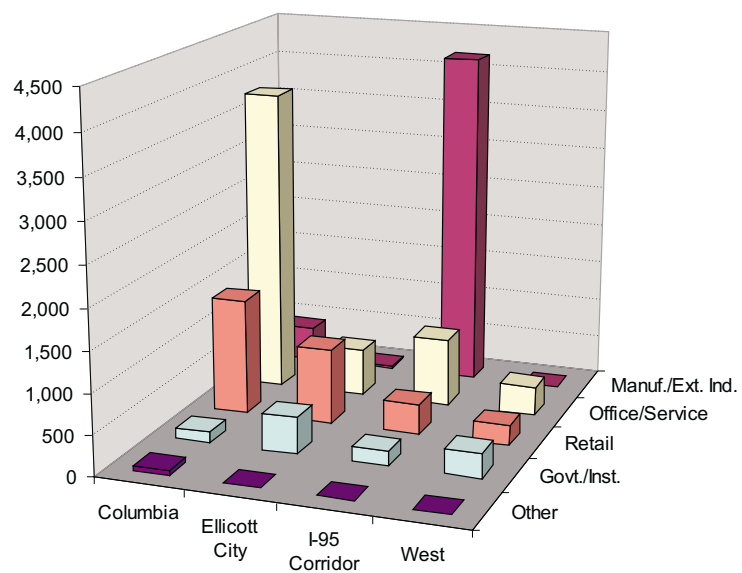
10/98 to 9/99						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	99,515	1,307,173	95,230	31,179	13,334	1,546,431
Ellicott City	52,402	113,179	24,250	0	0	189,831
I-95 Corridor	47,074	162,882	1,391,075	0	2,926	1,603,957
West	33,064	38,675	0	45,728	0	117,467
<b>TOTAL</b>	<b>232,055</b>	<b>1,621,909</b>	<b>1,510,555</b>	<b>76,907</b>	<b>16,260</b>	<b>3,457,686</b>
<b>PERCENT</b>	<b>6.7%</b>	<b>46.9%</b>	<b>43.7%</b>	<b>2.2%</b>	<b>0.5%</b>	<b>100.0%</b>

10/99 to 9/00						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	189,341	1,099,040	82,805	28,579	7,276	1,407,041
Ellicott City	207,918	164,672	0	116,731	613	489,934
I-95 Corridor	56,090	183,021	779,952	4,340	1,280	1,024,683
West	125,007	90,146	0	0	3,864	219,017
<b>TOTAL</b>	<b>578,356</b>	<b>1,536,879</b>	<b>862,757</b>	<b>149,650</b>	<b>13,033</b>	<b>3,140,675</b>
<b>PERCENT</b>	<b>18.4%</b>	<b>48.9%</b>	<b>27.5%</b>	<b>4.8%</b>	<b>0.4%</b>	<b>100.0%</b>

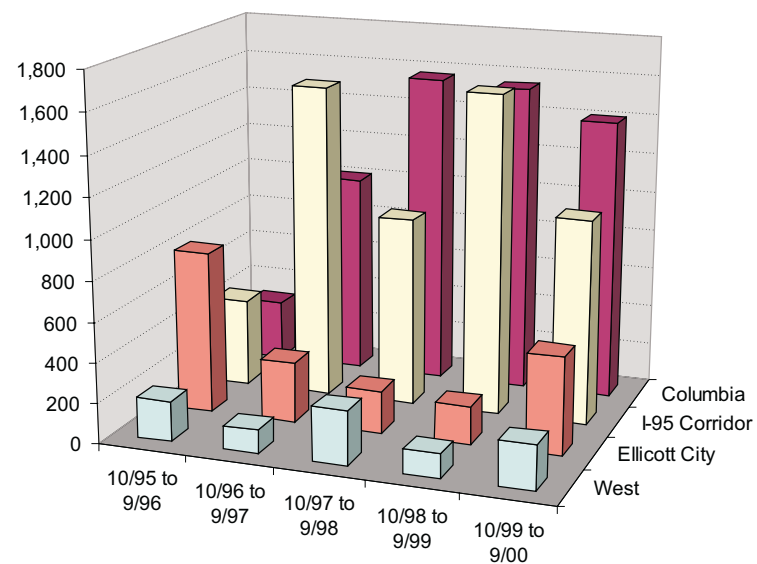
TOTAL 10/95 to 9/00						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other <sup>1</sup>	TOTAL
Columbia	1,441,554	3,789,364	422,575	130,756	52,771	5,837,020
Ellicott City	936,782	588,285	24,250	453,563	1,633	2,004,513
I-95 Corridor	378,145	847,572	4,184,069	180,068	5,485	5,595,339
West	247,809	357,438	5,010	303,936	3,864	918,057
<b>TOTAL</b>	<b>3,004,290</b>	<b>5,582,659</b>	<b>4,635,904</b>	<b>1,068,323</b>	<b>63,753</b>	<b>14,354,929</b>
<b>PERCENT</b>	<b>20.9%</b>	<b>38.9%</b>	<b>32.3%</b>	<b>7.4%</b>	<b>0.4%</b>	<b>100.0%</b>

1. Includes communication towers, country club, guard house, mausoleum, pool house, pumping station, and non-employee generating storage space.

**Chart 26**  
Non-Residential Square Feet - Building Permits (X 1,000)  
10/95 to 9/00



**Chart 27**  
Non-Residential Square Feet - Building Permits (X 1,000)





## Employment Estimates

To estimate employment several steps were taken. First, employment estimates as indicated on site development plans were used. If this was not available, then business owners were contacted to determine the estimated potential employment. Where this data were not available, employment was estimated based on the standard square feet per employee factors shown in Table 72. These factors are multiplied times the square footage of planned building space which is included on site development plans and building permits.

**Table 72**  
**Square Feet per Employee Standard Factors**

Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	250

The first section below estimates employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation and the U.S. Bureau of Economic Analysis.

### Estimated Employment from Site Development Plans

#### *Last Year's Results*

Space in site development plans approved last year from October 1, 1999 to September 30, 2000 could accommodate an estimated 8,451 employees (Table 73). About 47 percent of the potential jobs are located in Columbia, where they are mostly office jobs. About 28 percent of the potential jobs

**Table 73**  
**Potential Employment from Approved Non-Residential SDP's**  
**By Use Category, 10/01/99 to 9/30/00**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	424	3,491	0	26	20	3,961	47%
Ellicott City	60	1,081	0	256	80	1,477	17%
I-95 Corridor	39	1,458	862	0	0	2,359	28%
West	4	514	0	0	136	654	8%
<b>TOTAL</b>	<b>527</b>	<b>6,544</b>	<b>862</b>	<b>282</b>	<b>236</b>	<b>8,451</b>	<b>100%</b>
<b>PERCENT</b>	<b>6%</b>	<b>77%</b>	<b>10%</b>	<b>3%</b>	<b>3%</b>	<b>100%</b>	

are in the I-95 Corridor, also mostly office jobs. About 17 percent of the jobs are in Ellicott City and 8 percent are in the West.

Countywide, 6,544 potential jobs, or about 77 percent of the total, are office jobs. This is followed by 10 percent manufacturing/extensive industrial jobs, 6 percent retail jobs, and 3 percent each for government and institutional and schools and religious facilities.

#### *Five Year Results*

Tables 74 and 75 show the potential employment from approved site development plans over the last five years, from October 1, 1995 to September

**Table 74**  
**Potential Employment from Approved Non-Residential SDP's**  
**By Use Category, 10/01/95 to 9/30/00**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	2,927	11,271	1,300	180	43	15,721	55%
Ellicott City	1,727	1,461	1	416	161	3,766	13%
I-95 Corridor	919	1,869	3,569	0	175	6,532	23%
West	583	1,563	0	22	284	2,452	9%
<b>TOTAL</b>	<b>6,156</b>	<b>16,164</b>	<b>4,870</b>	<b>618</b>	<b>663</b>	<b>28,471</b>	<b>100%</b>
<b>PERCENT</b>	<b>22%</b>	<b>57%</b>	<b>17%</b>	<b>2%</b>	<b>2%</b>	<b>100%</b>	

**Table 75**  
**Potential Employment from Approved Non-Residential Site Development Plans**

<b>Region</b>	<b>10/95 to 9/96</b>	<b>10/96 to 9/97</b>	<b>10/97 to 9/98</b>	<b>10/98 to 9/99</b>	<b>10/99 to 9/00</b>	<b>TOTAL</b>
Columbia	1,953	2,235	3,374	4,198	3,961	<b>15,721</b>
Ellicott City	445	763	209	872	1,477	<b>3,766</b>
I-95 Corridor	992	1,439	717	1,025	2,359	<b>6,532</b>
West	149	193	813	643	654	<b>2,452</b>
<b>TOTAL</b>	<b>3,539</b>	<b>4,630</b>	<b>5,113</b>	<b>6,738</b>	<b>8,451</b>	<b>28,471</b>
<b>PERCENT</b>	<b>12%</b>	<b>16%</b>	<b>18%</b>	<b>24%</b>	<b>30%</b>	<b>100%</b>

30, 2000. Over the five year period, the total comes to 28,471 new jobs, an average of almost 5,700 jobs per year. Table 75 shows that there has been a steady increase in new jobs annually based on approved SDP's since 1995, ranging from 3,539 in 95/96 to 8,451 in 99/00.

Similar to the one year results, the greatest percentage of the jobs are located in Columbia with 55 percent of the total. The I-95 Corridor has 23 percent of the total, followed by 13 percent in Ellicott City and 9 percent in the West. Most of the new jobs are office/service jobs followed by retail jobs and then manufacturing/extensive industrial jobs. Jobs for government and institutional and schools and religious facilities comprise only 4 percent of the total.

## Estimated Employment from Building Permits

### *Last Year's Results*

An estimated 7,429 new jobs are projected based on issued building permits last year from October 1, 1999 to September 30, 2000 (Table 76). About 60 percent of the potential jobs, mostly office jobs, are located in Columbia. About 18 percent of the jobs are in the I-95 Corridor. The remaining 13 percent of the jobs are in Ellicott City and 9 percent are in the West.

Countywide, 5,394 potential jobs, or about 73 percent of the total, are office jobs. This is followed by 16 percent retail jobs and 10 percent manufacturing/extensive industrial jobs. The remaining 1 percent are jobs

for schools and religious facilities.

**Table 76**  
**Potential Employment from Issued Non-Residential Building Permits**  
**By Use Category, 10/01/99 to 9/30/00**

<b>Region</b>	<b>Retail</b>	<b>Office/ Service</b>	<b>Manuf./ Ext. Ind.</b>	<b>Govt. &amp; Inst.</b>	<b>Sch. &amp; Rel. Facilities</b>	<b>TOTAL</b>	<b>PERCENT</b>
Columbia	333	4,034	55	0	14	<b>4,436</b>	<b>60%</b>
Ellicott City	408	485	0	0	88	<b>981</b>	<b>13%</b>
I-95 Corridor	67	582	699	0	0	<b>1,348</b>	<b>18%</b>
West	371	293	0	0	0	<b>664</b>	<b>9%</b>
<b>TOTAL</b>	<b>1,179</b>	<b>5,394</b>	<b>754</b>	<b>0</b>	<b>102</b>	<b>7,429</b>	<b>100%</b>
<b>PERCENT</b>	<b>16%</b>	<b>73%</b>	<b>10%</b>	<b>0%</b>	<b>1%</b>	<b>100%</b>	

### *Five Year Results*

Tables 77 and 78 show the potential employment from issued building permits over the last five years, from October 1, 1995 to September 30, 2000. Over the five year period, the estimate results in 33,411 new jobs, an average of about 6,680 jobs per year. Table 77 shows that the latter years reflect most of the annual jobs estimates.

As expected, the greatest percentage of the jobs are located in Columbia with about 59 percent of the total. The I-95 Corridor has about 23 percent of the total, followed by 11 percent in Ellicott City and 7 percent in the West. Most of the new jobs are office/service jobs followed by retail jobs

**Table 77**  
**Potential Employment from Issued Non-Residential Building Permits**

Region	10/95 to 9/96	10/96 to 9/97	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	TOTAL
Columbia	747	2,871	6,141	5,446	4,436	<b>19,641</b>
Ellicott City	1,171	753	449	315	981	<b>3,669</b>
I-95 Corridor	780	1,711	1,675	2,276	1,348	<b>7,790</b>
West	352	147	940	208	664	<b>2,311</b>
<b>TOTAL</b>	<b>3,050</b>	<b>5,482</b>	<b>9,205</b>	<b>8,245</b>	<b>7,429</b>	<b>33,411</b>
<b>PERCENT</b>	<b>9%</b>	<b>16%</b>	<b>28%</b>	<b>25%</b>	<b>22%</b>	<b>100%</b>

**Table 78**  
**Potential Employment from Issued Non-Residential Building Permits**  
**By Use Category, 10/01/95 to 9/30/00**

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	4,190	15,108	161	120	62	<b>19,641</b>	<b>59%</b>
Ellicott City	2,481	827	4	91	266	<b>3,669</b>	<b>11%</b>
I-95 Corridor	1,147	1,863	4,633	7	140	<b>7,790</b>	<b>23%</b>
West	623	1,437	5	22	224	<b>2,311</b>	<b>7%</b>
<b>TOTAL</b>	<b>8,441</b>	<b>19,235</b>	<b>4,803</b>	<b>240</b>	<b>692</b>	<b>33,411</b>	<b>100%</b>
<b>PERCENT</b>	<b>25%</b>	<b>58%</b>	<b>14%</b>	<b>1%</b>	<b>2%</b>	<b>100%</b>	

and then manufacturing/extensive industrial jobs. Jobs for the government and institutional and school and religious facilities categories comprise only about 3 percent of the total.

## State of Maryland Employment Estimates

The previous sections estimate *potential* employment from new development. This section provides an overview of estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation (DLLR). This would include an increase in employment from new development as well as new jobs created in existing building space. The latter would generally reflect a decrease in vacancy rates. It could also be a result of the re-configuration of existing building space resulting in more jobs per square foot. An example of this is the re-configuration of a ware-

house to office use.

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance (UI) Law of Maryland and the unemployment compensation for federal employees (UCFE) program. Together these two account for approximately 98 percent of all wage and salary civilian employment. Since wage and salary employment represents approximately 93 percent of total civilian employment, DLLR estimates that their data reflects over 91 percent of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 30 percent of Howard County's employment in 1998 was not reported by the State.

Table 79 shows both DLLR and BEA employment data and the annual increase from 1995 to 2000. BEA data generally has a two year lag time resulting in no available data for 1999 and 2000. Observing the most recent State data, reflecting the first quarter employment data for each year, there has been an average increase of about 6,282 jobs per year for the last five years. Last year, from 1999 to 2000, 7,193 new jobs were added in Howard County.

Table 80 shows the jobs and average wages by job type as reported by the State for the first quarter of 1999 and 2000. In the first quarter of 2000, the State reported that there were 124,843 jobs in Howard County with an average weekly wage of \$730. This compares to 117,650 jobs one year

**Table 79**  
**Jobs in Howard County**

Year	DLLR <sup>1</sup>		BEA <sup>2</sup>	
	Jobs	Increase	Jobs	Increase
1995	93,435		125,253	
1996	96,793	3,358	131,649	6,396
1997	104,920	8,127	140,187	8,538
1998	110,732	5,812	147,786	7,599
1999	117,650	6,918	NA	NA
2000	124,843	7,193	NA	NA
<b>Average</b>		<b>6,282</b>		

1. Maryland State Department of Labor, Licensing and Regulation  
(1st quarter employment)

2. U.S. Bureau of Economic Analysis (annual employment)

earlier with an average wage of \$668. The strong economy has resulted in this net increase of 7,193 jobs and about a 9 percent increase in average wages.

The 1990 General Plan called for job growth in Howard County to increase by an average of 2,820 jobs annually between 1990 and 1995 and 3,040 jobs annually between 1995 and 2000. Based on this, the growth expected between 1995 and 2000 would be 15,200 new jobs. Actual job growth as reported by the State over the five year period totals 31,408, more than double the five year 1990 General Plan target. (Note that because the State does not report jobs that are not covered by unemployment insurance, many jobs – the self-employed, those that work for commission, proprietors, etc. – are not included in these figures.)

**Table 80**  
**Jobs and Wages by Industry, 1999 and 2000<sup>1</sup>**

Job Type	1999		2000	
	Jobs	Avg. Wage	Jobs	Avg. Wage
<b>Government</b>				
Federal	692	\$798	760	\$971
State	3,726	\$718	3,744	\$769
Local	9,474	\$581	10,074	\$667
<b>Subtotal</b>	<b>13,892</b>	<b>\$629</b>	<b>14,578</b>	<b>\$709</b>
<b>Private</b>				
Contract Construction	8,403	\$763	9,385	\$857
Manufacturing	7,176	\$758	7,974	\$841
Trans, Comm, Utilites	5,882	\$759	6,461	\$813
Wholesale Trade	11,735	\$849	11,850	\$989
Retail Trade	22,066	\$361	24,477	\$374
FIRE	6,106	\$1,000	5,877	\$1,101
Services	40,707	\$705	42,536	\$766
Other	1,684	\$456	1,705	\$507
<b>Subtotal</b>	<b>103,758</b>	<b>\$673</b>	<b>110,265</b>	<b>\$733</b>
<b>TOTAL</b>	<b>117,650</b>	<b>\$668</b>	<b>124,843</b>	<b>\$730</b>

1. State Department of Labor, Licensing and Regulation (1st quarter employment)

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